Springboard Promocart User Manual v3.6.3

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Part I

1 Getting Started Overview

Springboard Promocart is a premier eCommerce solution that enables business of all sizes to create, manage and grow their on-line business. The following guide provides you the facility to set up a basic storefront. These steps will assist you in providing Springboard Promocart with basic information necessary to conduct transactions. We recommend you to complete these steps first before you begin adding products to store.

1. Enter the **Username** and **Password**, as shown in the Figure 1-1-1 below and click on the **Login** button. This information may have been provided to you via e-mail, or you may have set this up during installation.

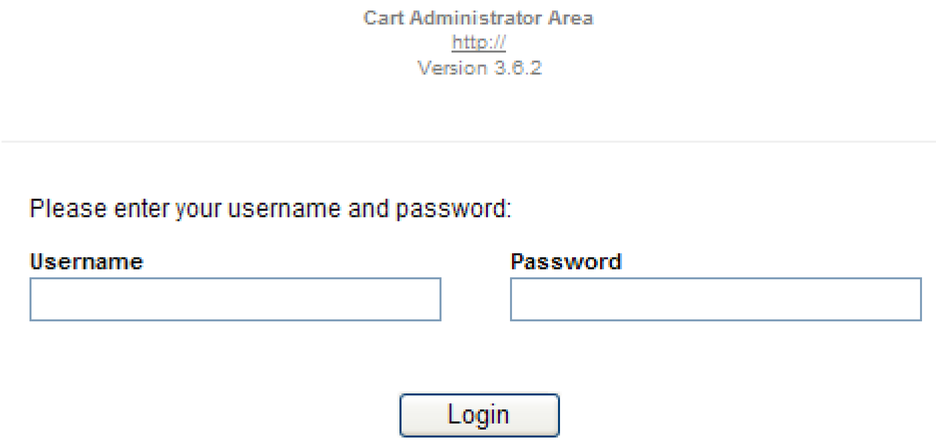


Figure 1-1-1: Login Page

2. **Admin Area Home** page will open, as shown in the Figure 1-1-2 below.

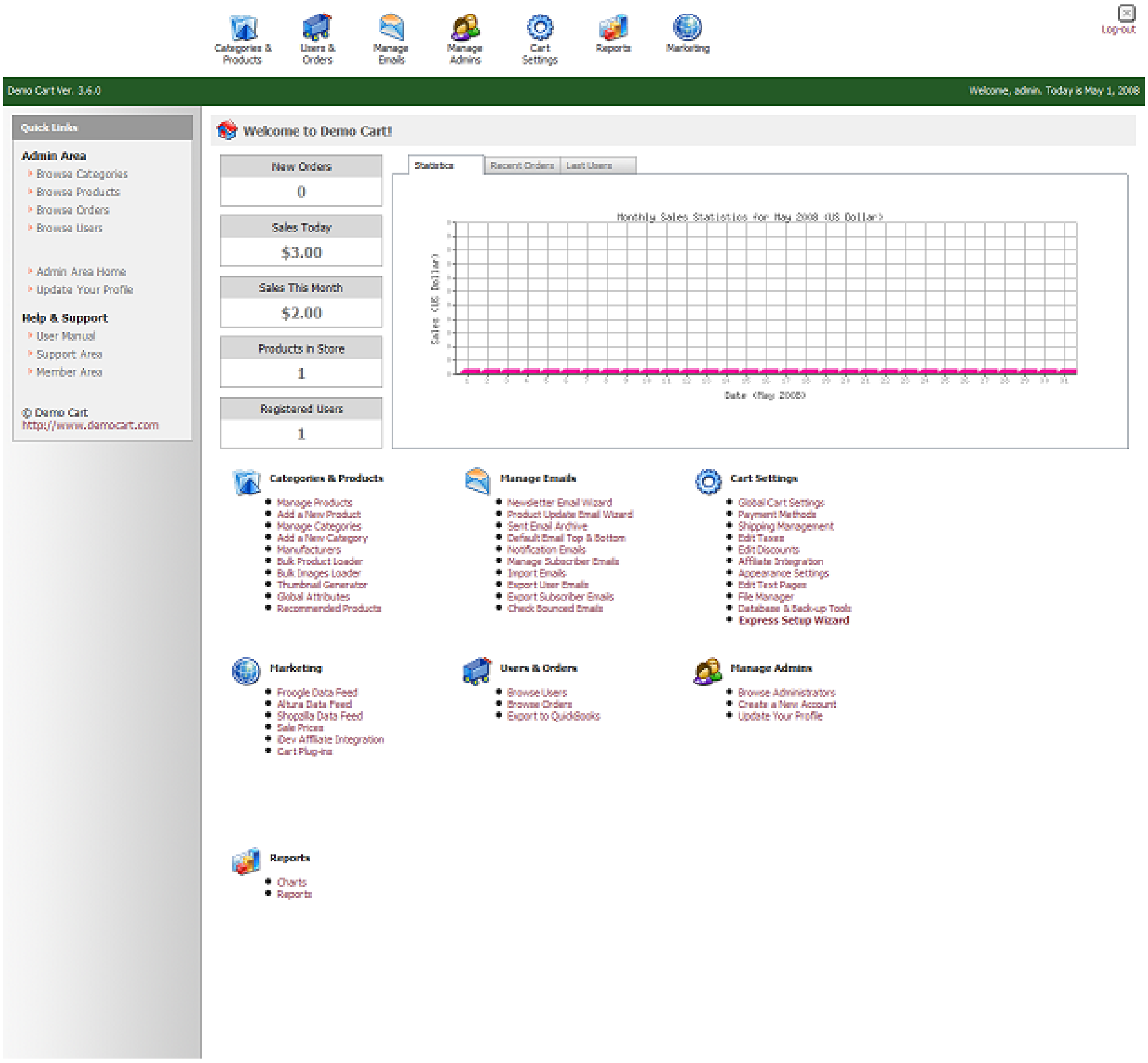


Figure 1-1-2: Admin Area Home page

3. Click **Global Cart Settings** in Cart Settings.

4. In Global Cart Settings 107 page:
   a. Click **Company Information** and enter all relevant information about your company.
   b. Click **Global Site Settings** and enter information about administration e-mails, support e-mails, site name and URL information. Keep in mind this information will be presented to your customers from the cart and via e-mail. The e-mail address you enter is not used for admin notifications, it is only presented to the customer. Admin notifications are set up through the **Manage Admins** area.

5. Click **Payment Methods** in Cart Settings.

6. In Payment Methods 142 **(Quick Setup)** page, select the **payment methods**

you will be accepting. Be sure to click the **edit** icon to make adjustments and enter in text for the cart.

7. Click **Shipping Management** in Cart Settings.

8. In Shipping Management 167 page, select the **shipping method** you will allow your customers to use. Springboard Promocart has the ability to get real-time rates from Fed-Ex, UPS and USPS. You can also create your own **custom methods**.

9. Click Edit Taxes in Cart Settings (if applicable).

10. Select the states / countries where you will be charging tax and enter the rate.

11. Click **Appearance Settings** in Cart Settings.

12. In Appearance Settings 190 page:
    a. **Edit Site Header and Footer:** You can enter HTML, which will appear on the top and bottom of your site, or follow the directions to have your logo appear.
    b. **Edit Site Home Page:** Enter the information to appear in the middle section of your home page.

After you complete these steps, you can enter your product into the Springboard Promocart system. You can do this individually or by using the **Bulk Product Loader** . We suggest reviewing the user manual before you begin.

Top Level Intro

This page is printed before a new top-level chapter starts

Part II

2 Categories & Products

2.1 Manage Categories Overview

You can use this section to manage the various functions related to the management of categories. Categories, along with the search function, allow customers to easily find items within your store. Please take the time make sure your categories are set up in an easy-to-understand matter.

> ***Marketing Tip:*** If at all possible, try to limit the number of **Parent Categories** to under 15 if possible, this will prevent users from getting overwhelmed when they first land on your home page.

The following activities can be done with regards to a category:

Add a New Category or Subcategory 11
Edit an Existing Category 14

2.1.1 Add a New Category or Subcategory

To **Add a New Category** or **Subcategory**, follow the steps:

1. Click **Add a New Category**, as shown in the Figure 2-1-1 below.

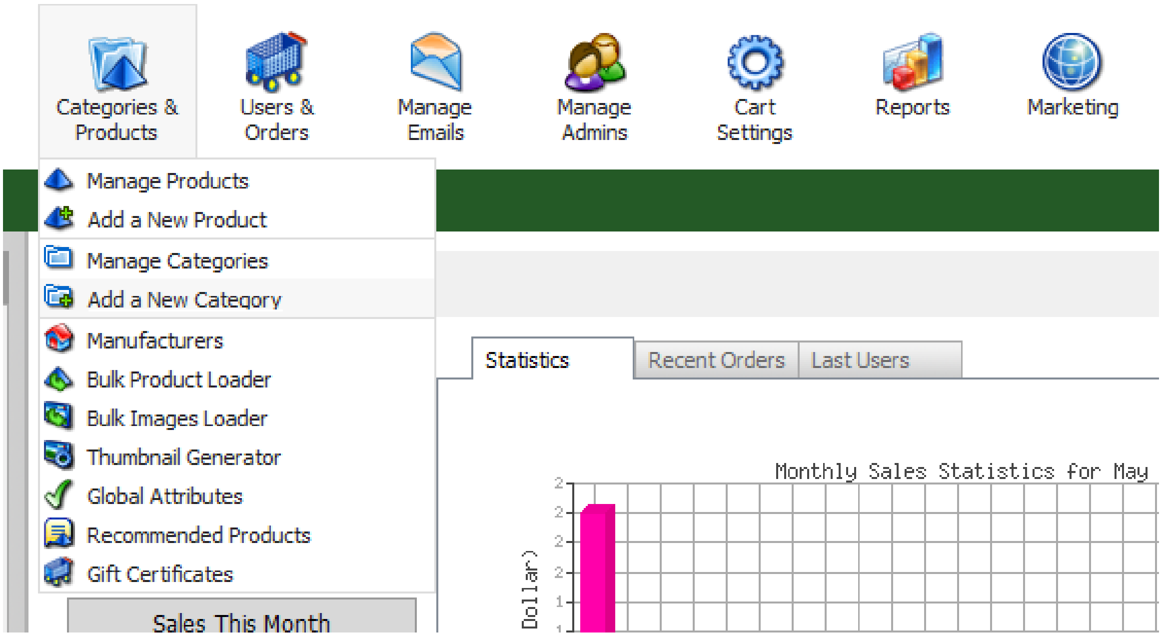


Figure 2-1-1: Add a New Category

The **Category (Insert)** page opens.

Note: You can also open the **Category (Insert)** page directly, by clicking on **Add a New Category** link in the Admin Area Home page 8.

2. **Parent Category:** Select **Category Root** to create a **new category**, as shown in the Figure 2-1-2 12 below.

Marketing Tip: Keep you category names very short and specific

Note: Select any **parent category** from the available categories, to add or create a **child category** (**Subcategory**) under it.

You can also **add a subcategory**, by clicking **Add Subcategory**  icon from Manage Catalog Categories page. 15

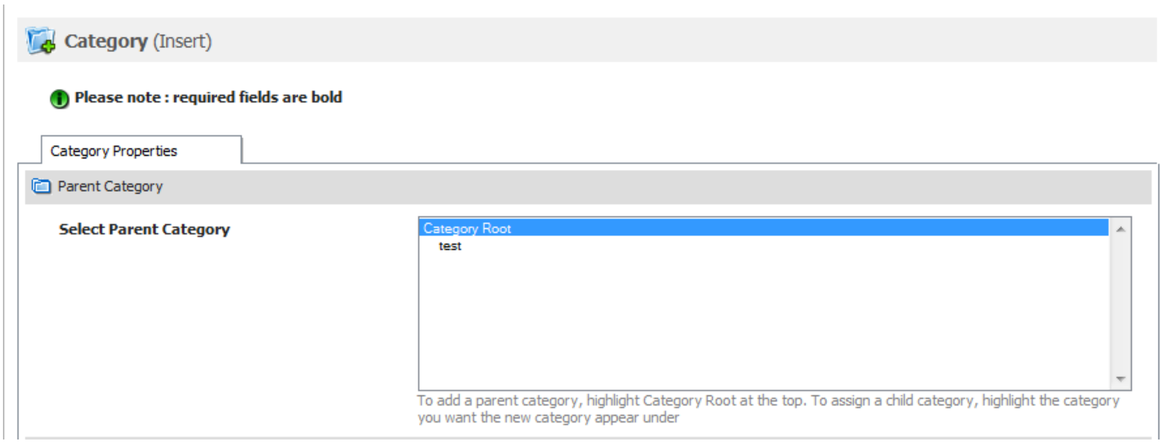


Figure 2-1-2: Parent Category

3. **Category Properties:** Enter the following information:
   a. **Category Name:** Type the name of the category.
   b. **Category Key:** Used for bulk uploading of products with the bulk loader feature. It may be the same as the category name, but without spaces (example: Music_and_Movies).
   c. **Category Header:** Here you can add an additional information about the category, mainly for SEO purposes.
   d. **Meta Keywords, Title, and Description:** In these fields you want to input your meta information for SEO purposes.
   e. **Is Category Visible to Users:** Uncheck the box if you don't want this category visible to the user. Otherwise, let it remain checked. By default, the box is checked.
   f. **List Subcategories on Catalog Page:** Check the box if you want to list subcategories on the Catalog Page. Otherwise, let it remain unchecked.
   e. **Priority:** Use priority to have products listed higher within Springboard Promocart. You can select this on a scale of 1 to 10, where 1 is given the highest priority. The higher the number, the higher the product will be listed.

Note: All categories at the same level in a catalog tree are sorted by priority.

Categories with the same priority are sorted alphabetically.

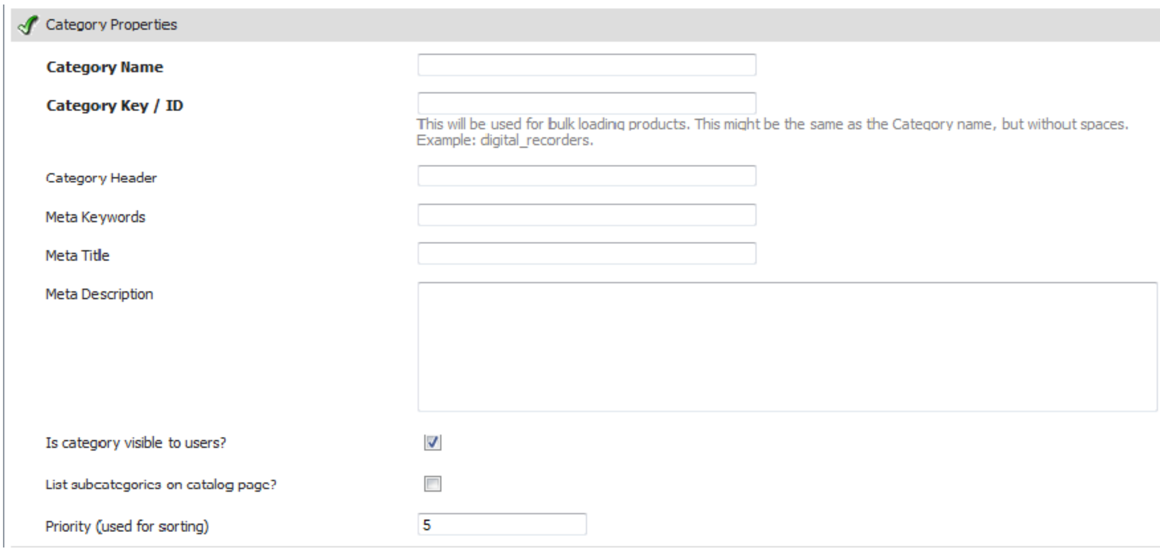


Figure 2-1-3: Category Properties

4. **Category Description:** Type a description for the category, as shown in the Figure 2-1-4 below.

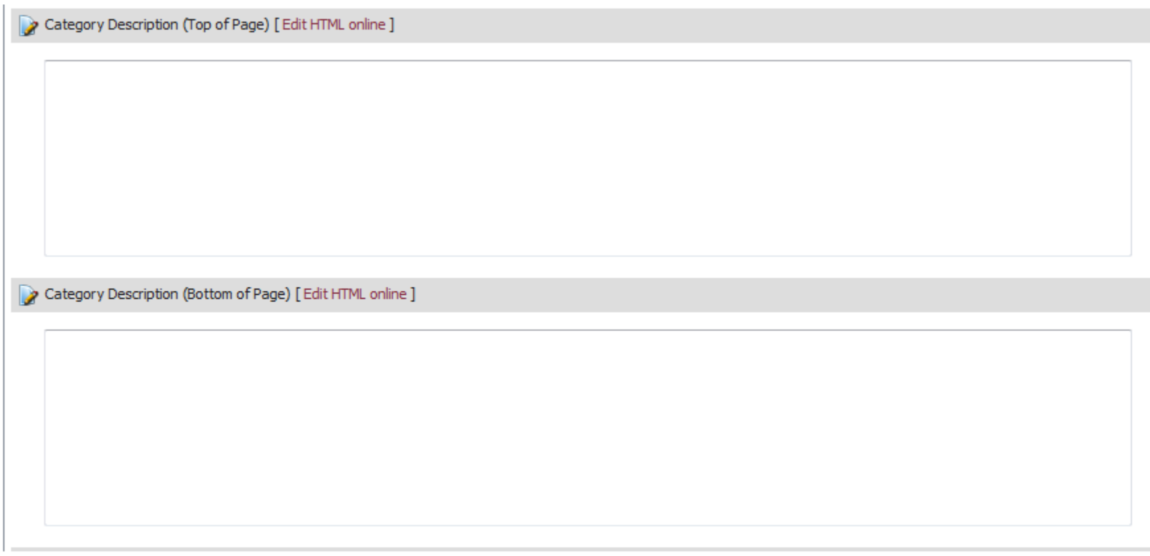


Figure 2-1-4: Category Description

5. You can also create an eye-catching description, by clicking **Edit HTML Online** in **Category Description**, as shown in Figure 2-1-5 below. This field allows you to enter HTML-enriched category description.

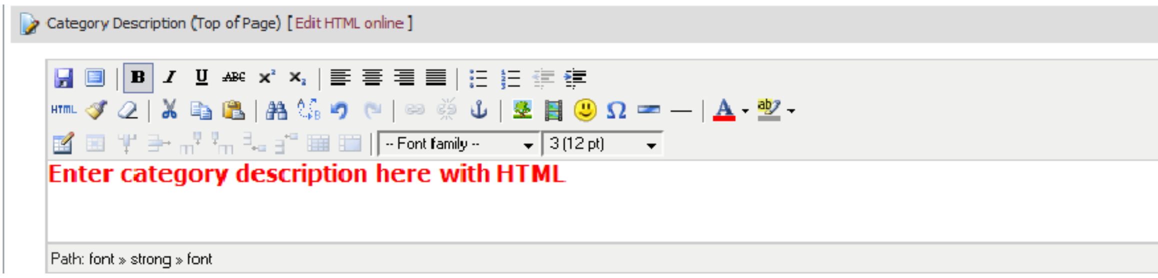


Figure 2-1-5: Online HTML Editor

6. **Category Image:** Click **Browse** and navigate to the image that you would like to upload for the category. The images can be in JPG, PNG and GIF format.

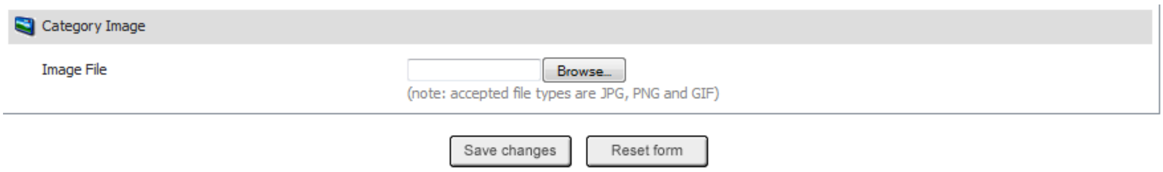


Figure 2-1-6: Category Image

7. If you want to reset the form, click on **Reset form** button.
8. Click **Save changes** button to save the details about the category. You will get a confirmation message that the new products category has been successfully created.

2.1.2 Edit an Existing Category

You can use this option to edit an existing category. To **edit an existing category**, follow the steps:

1. Click **Manage Categories**, as shown in the Figure 2-2-1 below.

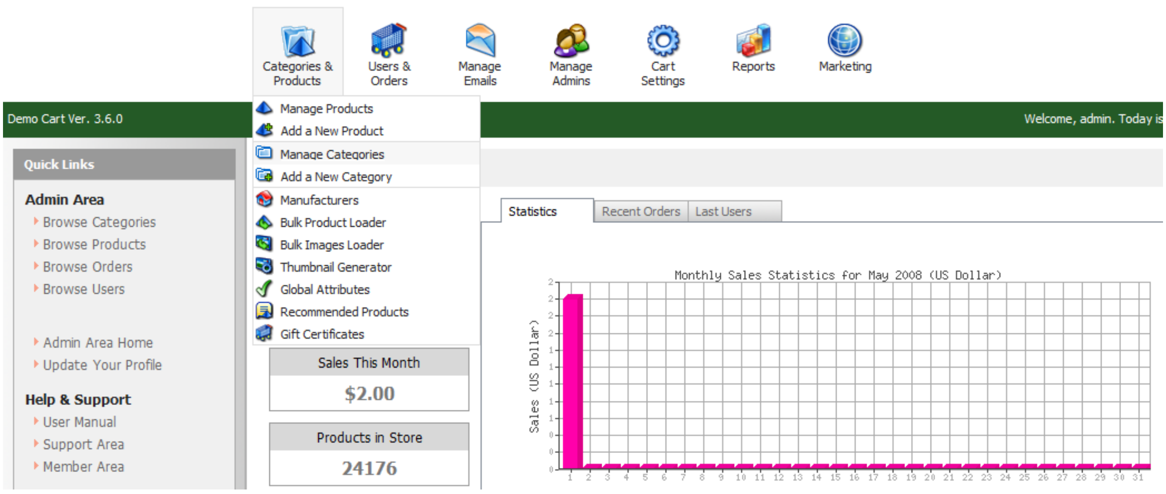


Figure 2-2-1: Manage Categories

2. The **Manage Catalog Categories** page will open, as shown in the Figure 2-2-2 15 below.

Note: You can also open the **Manage Catalog Categories** page directly, by clicking on the **Manage Categories** link in the Admin Area Home page 8 .

You can also **add a subcategory**, by clicking **Add Subcategory** icon from Manage Catalog Categories page. 15

You can also **add a new category** from the **Manage Catalog Categories** page. To **add a new category**, click **Add a New Category** link on top of the page.

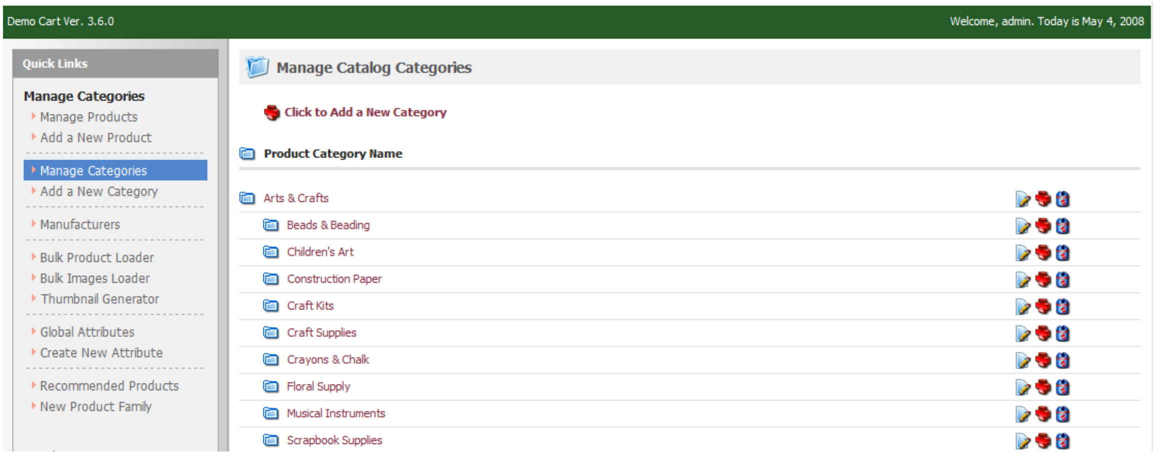


Figure 2-2-2: Manage Catalog Categories

3. Click **Edit Category** icon for the category you want to modify.
4. The **Category (Update)** page opens, as shown in the Figure 2-2-3 16 below, where you can modify all the parameters of that category.

Note: You can also **delete the category** from the **Category (Update)** page. To delete the category, click **Remove this category** link on top of the page.

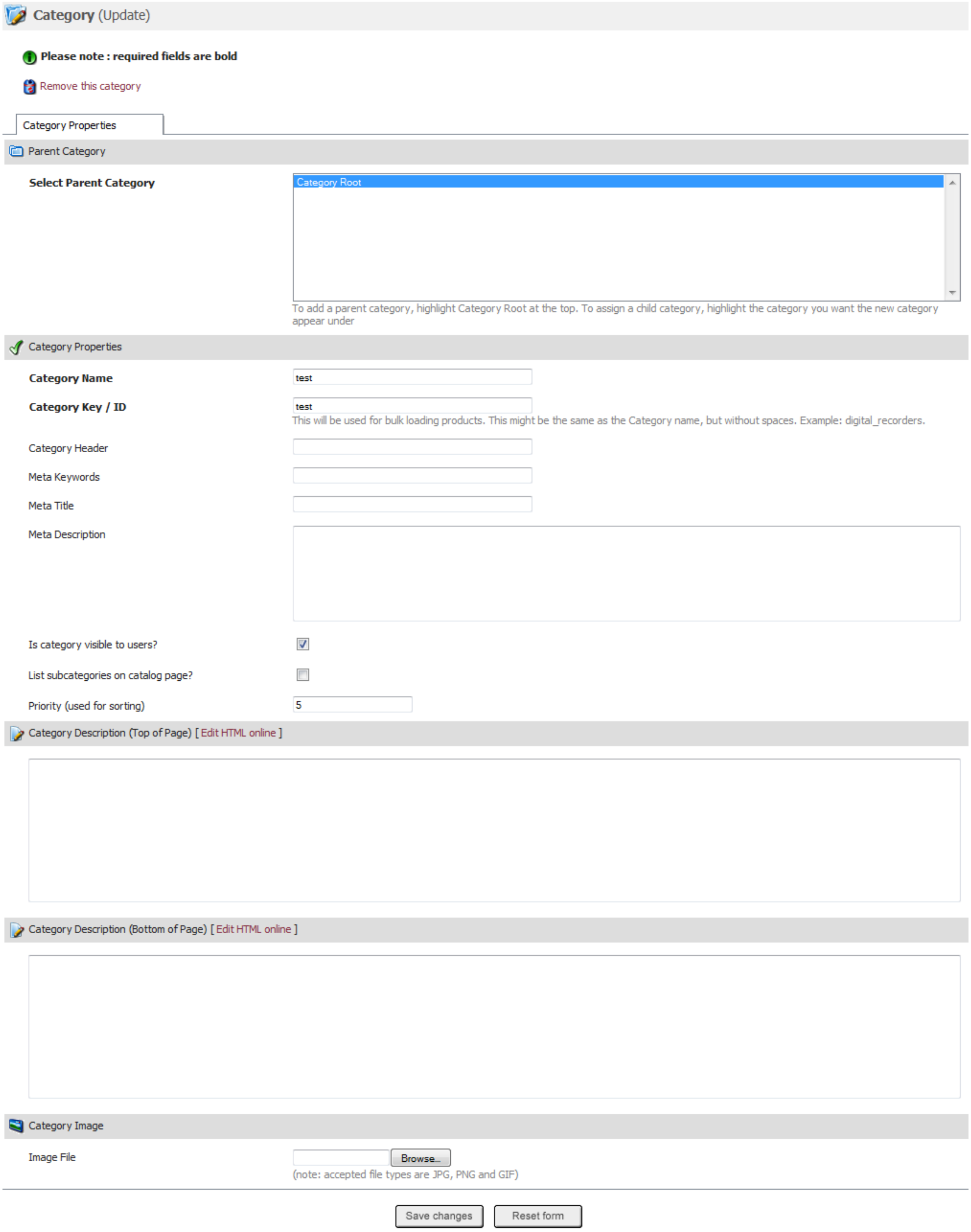


Figure 2-2-3: Category (Update)

5. If you want to reset the form, click on the **Reset form** button.
6. Click **Save changes** button to update the information. You will get a

confirmation message that the category data has been successfully updated.

2.1.3 Delete an Existing Category

You can use this section to delete an existing administrator account. To **delete an existing administrator account**, follow the steps:

1. Open 101 the **Site Administrators** page.
2. Click **Delete Account** icon for a category you want to remove. A pop up appears asking for confirmation, as shown in the Figure 5-4-1 below.
3. Confirm deletion process, by clicking **OK** button. You will get a confirmation message that the administrator account has been successfully removed.

2.2 Manage Products Overview

You can use this section to manage the various functions related to management of products. The following things can be done with regards to a product:

2.2.1 Add a New Product

To **Add a New Product**, follow the steps:

1. Click **Add a New Product**, as shown in the Figure 2-4-1 below.

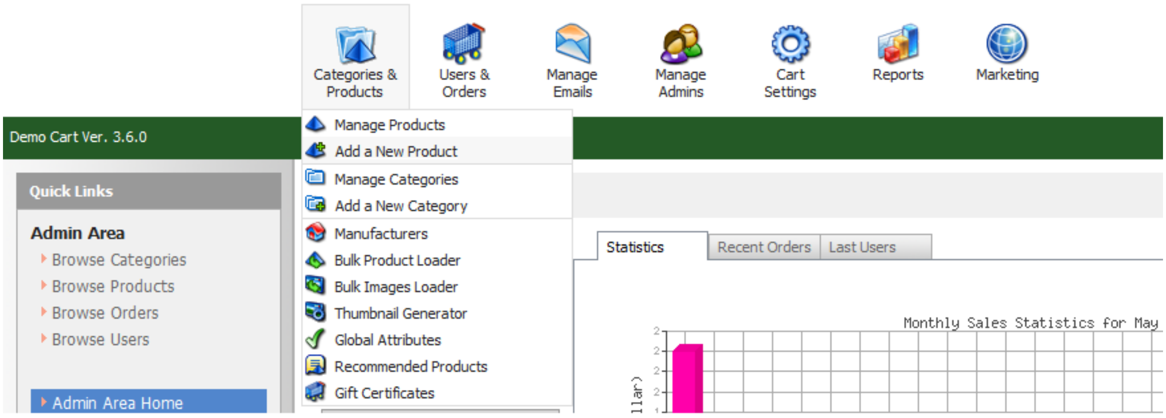


Figure 2-4-1: Add a New Product

The **Product (Insert)** page opens. By default, the **Product (Insert)** page opens under the **Product Info** tab, as shown in the Figure 2-4-2 18 below.

Note: You can also directly open the **Product (Insert)** page under the **Product Info** tab, by clicking on **Add a New Product** link in the Admin Area Home page 8.

2. **Product Categories:** Use this section to organize your products by selecting product categories.
    a. **Main (primary) Category:** Select the primary (main) product category from the drop down menu.
    b. **Secondary Categories:** Select the secondary product category by clicking on it.

Note: You can **select multiple secondary categories** by holding the **Ctrl button** on your keyboard and then clicking on the **categories**.

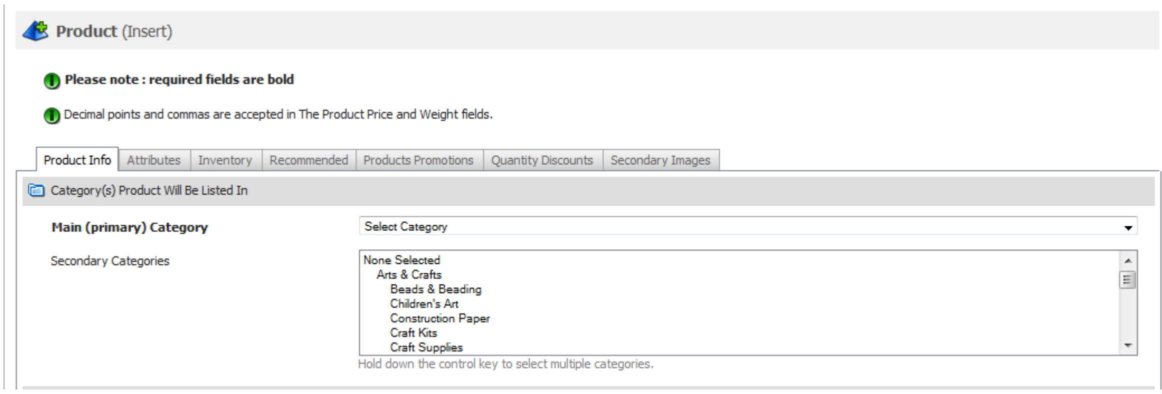


Figure 2-4-2: Product Categories

3. **Product ID / Name:** Enter the following information:
    a. **Product ID:** All products need to have an ID associated with them for easy look-up and identification. It is a unique identifier of the product in the store. This ID can also be used for Bulk Loading images via FTP 48 to Springboard Promocart.

b. **Product Name (title):** Type the name of the product.
c. **Meta Keywords:** Keywords to be used for searching this category. This may also help with search engine positioning.
d. **Meta Title:** The customer will view the Meta title tags at the top of the browser window. Meta title tags help the search engines to decide your web page relevancy for the keyword phrases. You can enter the title of the product name as Meta title tag.
e. **Meta Description:** A short, plain language description of the document, usually 20-25 words or less. Search engines that support this tag will use the information to publish on their search results page, normally below the Title of your site. This tag is particularly important if your document has very little text, is a frame set, or has extensive scripts at the top.
f. **Product manufacturer:** Select the Product Manufacturer Name from the drop-down menu to search products by the product manufacturer. If you don't want to search the product by the manufacturer name, let it remain on **Do not assign manufacturer**. By default, the **Do not assign manufacturer** is selected in the drop-down menu.
g. **Priority:** Use priority to have products listed higher within Springboard Promocart. A higher number shall have a higher product listing. You can use either positive or negative numbers: For example: 50, -20, 4.

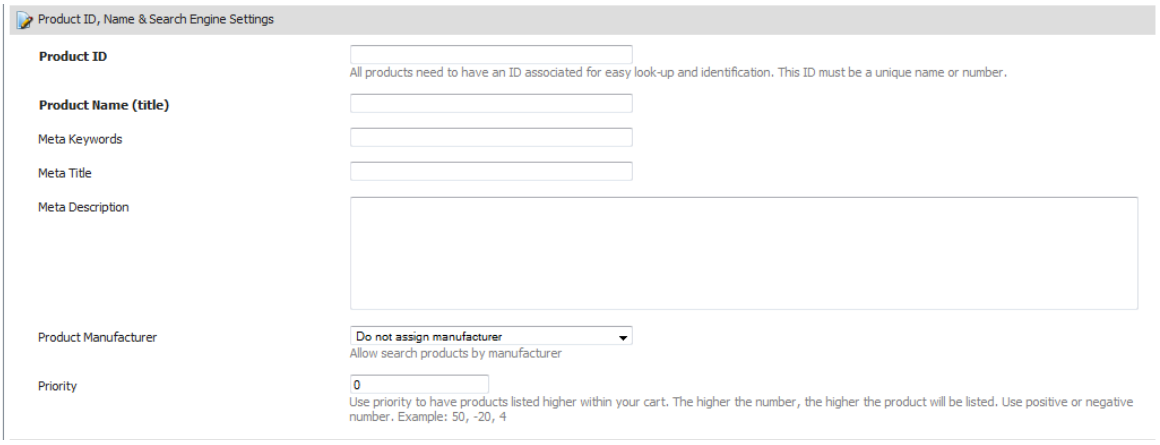


Figure 2-4-3: Product ID / Name

4. **Properties:** Enter the following information:
   a. **Item Price:** Type a numerical value with dot-separated decimal (i.e 1.45, 0.34). Do not enter any currency symbols. We have also incorporated a feature that allows you to show or hide the unit price. Check the **Call For Price** box next to the **Item Price** field, to hide a product's price.
   b. **Sale Price:** If this item is on sale, enter the Sale Price.
   c. **Is this product is a Taxable Item:** Check the box for calculating the tax for this product to the total amount of user's order. If you uncheck the box, then, the tax for this product will not be added. By default, the box is checked.
   d. **Select Taxes Class :** Here you will determine what tax class you want this product to be a part of. The default value is 'General'.

e. **Tax Rate at Product Level :** If you wanted to give this product a custom tax rate (i.e. %7.55), you would put it in here. *Note that you do not put the % symbol into this field, just the numerical values.

Note: The sale price will appear in red color, below the retail (original) price indicating this item is on sale or has been discounted.

f. **Free Shipping:** Check the box if there is no shipping charges for the product. Otherwise, let it remain unchecked if there are shipping charges for the product.
g. **Unit Weight (lbs):** Enter the weight for the product.
h. **Shipping Price for Product Level:** By default, the cart assumes all shipping prices are calculated at the product level. If you enter in 0.00 (which is the default) the cart will use the Global Shipping Methods 167 to calculate a shipping price, if an amount is entered, it will use the price entered and NOT use the global method.

IMPORTANT: If you are using a real-time shipping method, all items in your store will need to have a product weight for a shipping price to be presented to your customer.

Note: Unit Weight is not required, if free shipping is selected for the product.

i. **Inter pack / Case pack:** Enter the number of Inter pack and Case pack if applicable for product. Case pack must indicate total number of product items in the case. This feature will only be present if you have activated it in Wholesale Settings 127.
j. **Minimum/Maximum Quantity in Order:** Specify the minimum and maximum quantity a customer can order for a product, that may be added to the cart. By default, the minimum order for a product is 1.

Note: Leave the field blank if you don't want to use this feature.

k. **Is Product Available:** Check the box if the product is available. Otherwise, let it remain unchecked if it is not available. By default, the box is checked.
l. **Mark Product as Hot Deal:** Check the box to mark the product as a Hot Deal. Otherwise, let it remain unchecked if it is not a Hot Deal.

Note: Hot Deal products are always first on product catalog pages.

m. **Show Product On Home Page:** Check the box to show the product on the Home Page. Otherwise, let it remain unchecked to hide the product on the Home Page.

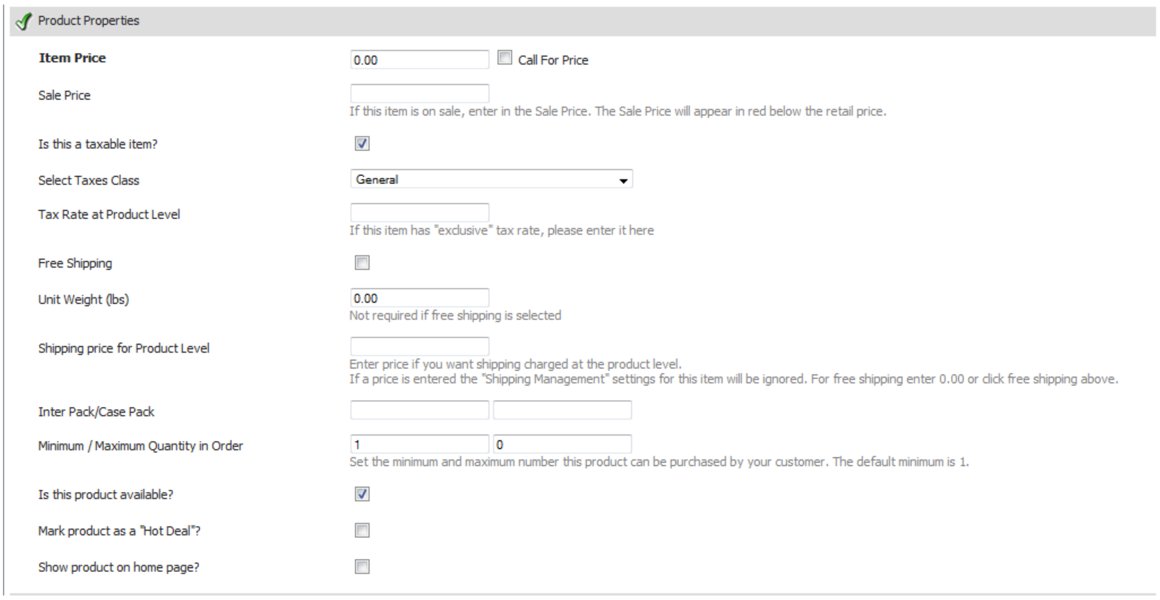


Figure 2-4-4: Properties

5. **Quick Overview:** Click on in the extreme right of **Quick Overview** to expand it, and then, enter the overview for the product in plain text.

Note: HTML is not allowed in **Quick Overview**. The overview information may also appear on the Catalog pages.

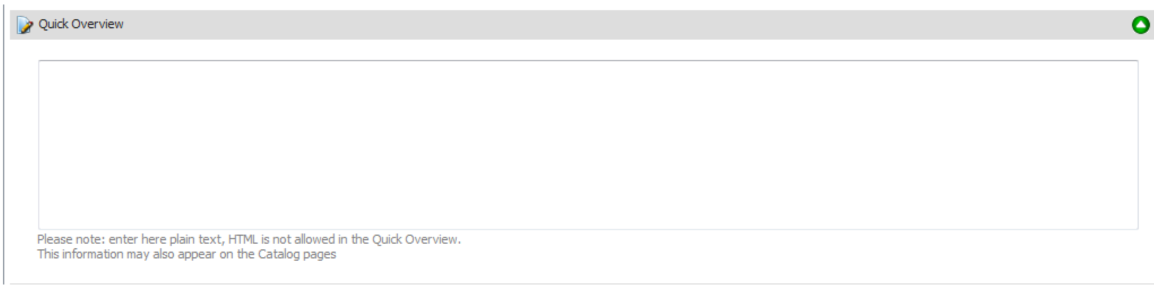


Figure 2-4-5: Quick Overview

6. **Detailed Description:** Enter the detailed description for the product in plain text.

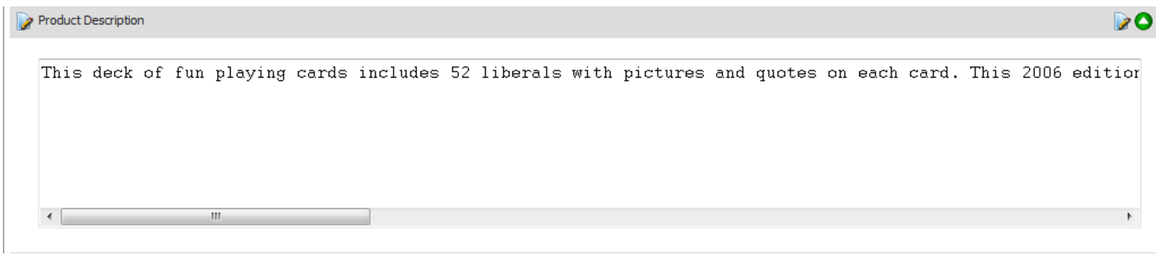


Figure 2-4-6: Description

7. You can also create an eye-catching description, by clicking in **Description**, as shown in Figure 2-4-7 below.

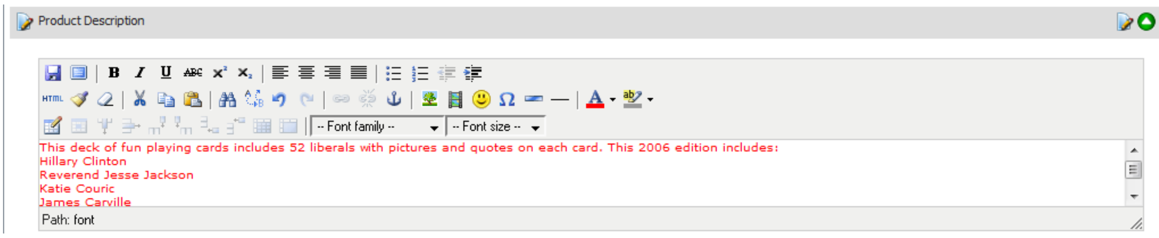


Figure 2-4-7: Online HTML Editor

8. **Image Zooming:** Select 'Zoom', 'Magnify' or 'None' Depending on the affect you want to give on your product images on the product page.
9. **Product's Image Uploading:** Click **Browse** and navigate to the image that you would like to upload for the product. The images only can be in JPG and PNG format.

Note: To add more than one image under Product's Image Uploading, click the **Save Changes** button and select **Edit This Product** on the next page. Then, select the Secondary Images under the product. To know more about **Secondary Images**, click here 38.

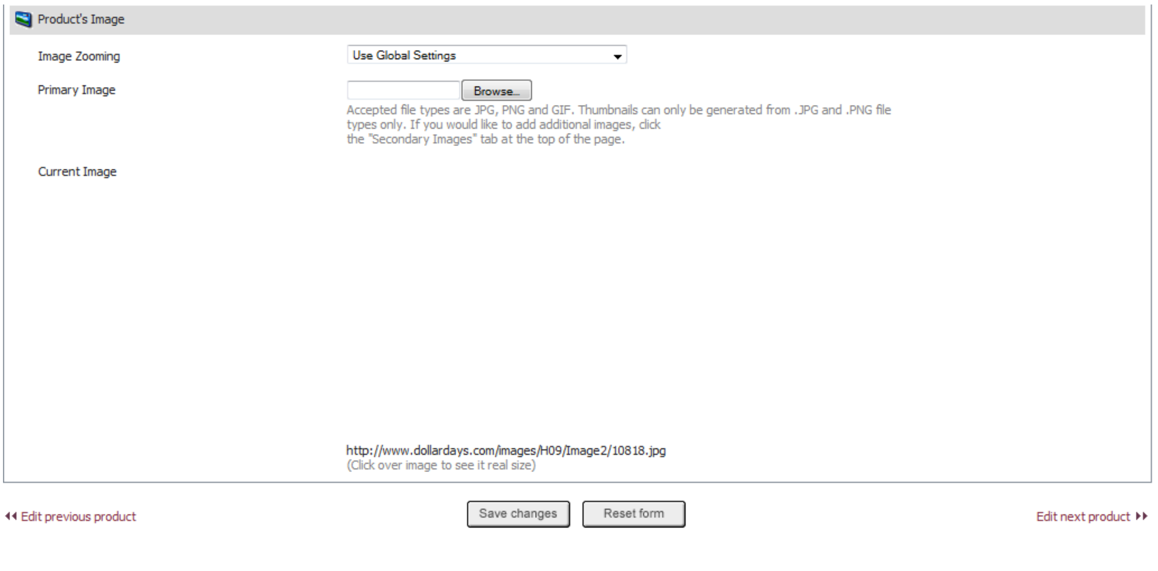


Figure 2-4-8: Product's Image Uploading

Note: You can also **Assign Existing Global Attributes with a product**, so that it would appear every time you add a product. To know how to **Assign Existing Global Attributes with a product**, click here 55.

To know how to create new global attributes, click here 52.

10. If you want to reset the form, click on the **Reset form** button.
11. Click **Save changes** button to save the details about the product. You will get a confirmation message when the new product has been successfully added.

Note: Click on the links below to know more about the **Attributes**, **Recommended Family**, **Product Promotions**, **Quantity Discounts** and **Secondary Images** for a

product.

[Attributes 55]
[Recommended Family 33]
[Product Promotions 34]
[Quantity Discounts 36]
[Secondary Images 38]

2.2.2 Edit an Existing Product

You can use this option to edit an existing product. To **edit an existing product**, follow the steps:

1. Click **Manage Products**, as shown in the Figure 2-5-1 below.

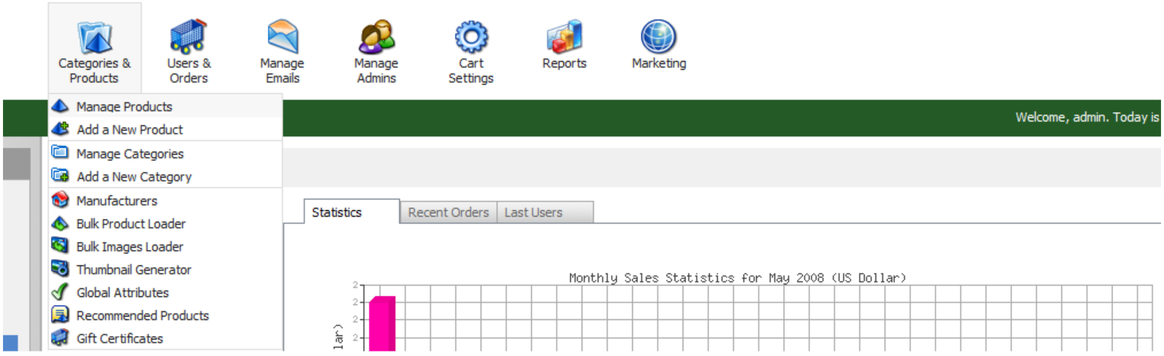


Figure 2-5-1: Manage Products

2. The **Products List** page will open, as shown in the Figure 2-5-2 below.

Note: You can also directly open the **Products List** page, by clicking on the **Manage Products** link in the Admin Area Home page [8].

You can also **add a new product** from the **Products List** page. To **add a new product**, click **Add a New Product** link on top of the page.

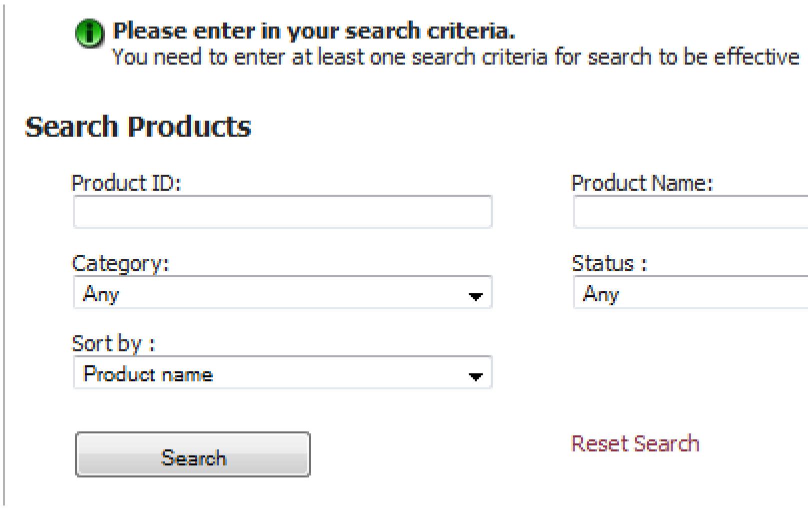
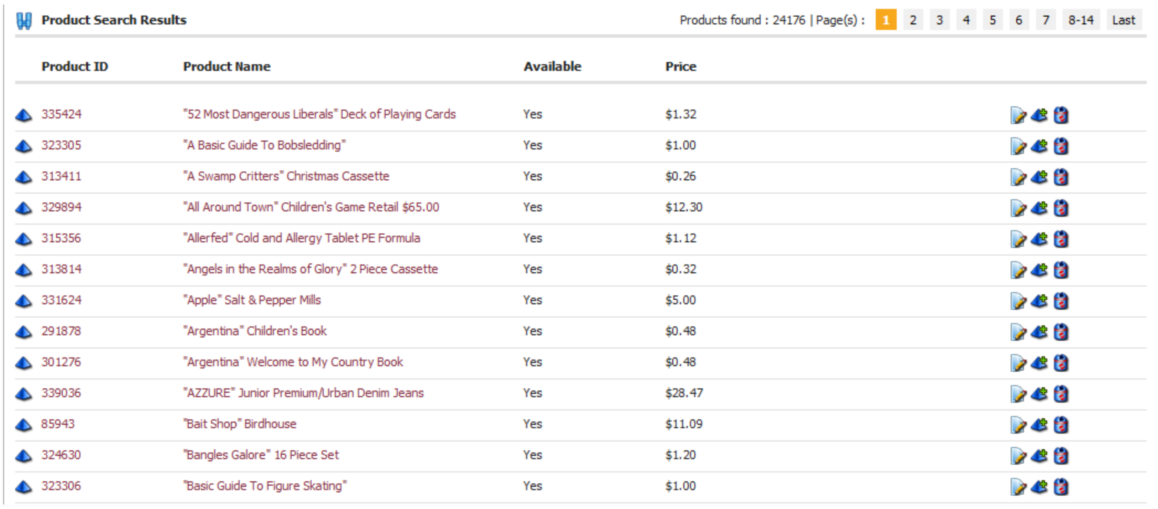


Figure 2-5-2: Products List

3. To search for a particular product, type the **Product ID** or **Product Name** in the **Products List** page. You can also search for products, by selecting a particular product **Category**, **Status** or **Sort by** from the drop down menu.
4. After entering the search criteria in the **Products List** page, click **Search products** button.
5. The **Search Results** page opens, as shown in the Figure 2-5-3 below.



Product Search Results — Products found : 24176 | Page(s) : 1 2 3 4 5 6 7 8-14 Last

Product ID	Product Name	Available	Price
335424	"52 Most Dangerous Liberals" Deck of Playing Cards	Yes	$1.32
323305	"A Basic Guide To Bobsledding"	Yes	$1.00
313411	"A Swamp Critters" Christmas Cassette	Yes	$0.26
329894	"All Around Town" Children's Game Retail $65.00	Yes	$12.30
315356	"Allerfed" Cold and Allergy Tablet PE Formula	Yes	$1.12
313814	"Angels in the Realms of Glory" 2 Piece Cassette	Yes	$0.32
331624	"Apple" Salt & Pepper Mills	Yes	$5.00
291878	"Argentina" Children's Book	Yes	$0.48
301276	"Argentina" Welcome to My Country Book	Yes	$0.48
339036	"AZZURE" Junior Premium/Urban Denim Jeans	Yes	$28.47
85943	"Bait Shop" Birdhouse	Yes	$11.09
324630	"Bangles Galore" 16 Piece Set	Yes	$1.20
323306	"Basic Guide To Figure Skating"	Yes	$1.00

Figure 2-5-3: Search Results

6. Click **Edit Product** icon for the product you want to modify.
7. The **Product (Update)** page opens, as shown in the Figure 2-5-4 26 below where you can modify all the parameters of that product.

Note: The **Product (Update)** page opens under the **Product Info** tab, as shown in the Figure 2-5-4 26 below.

You can also **delete the product** from the **Product (Update)** page. To delete a product, click **Delete this product** link on top of the page.

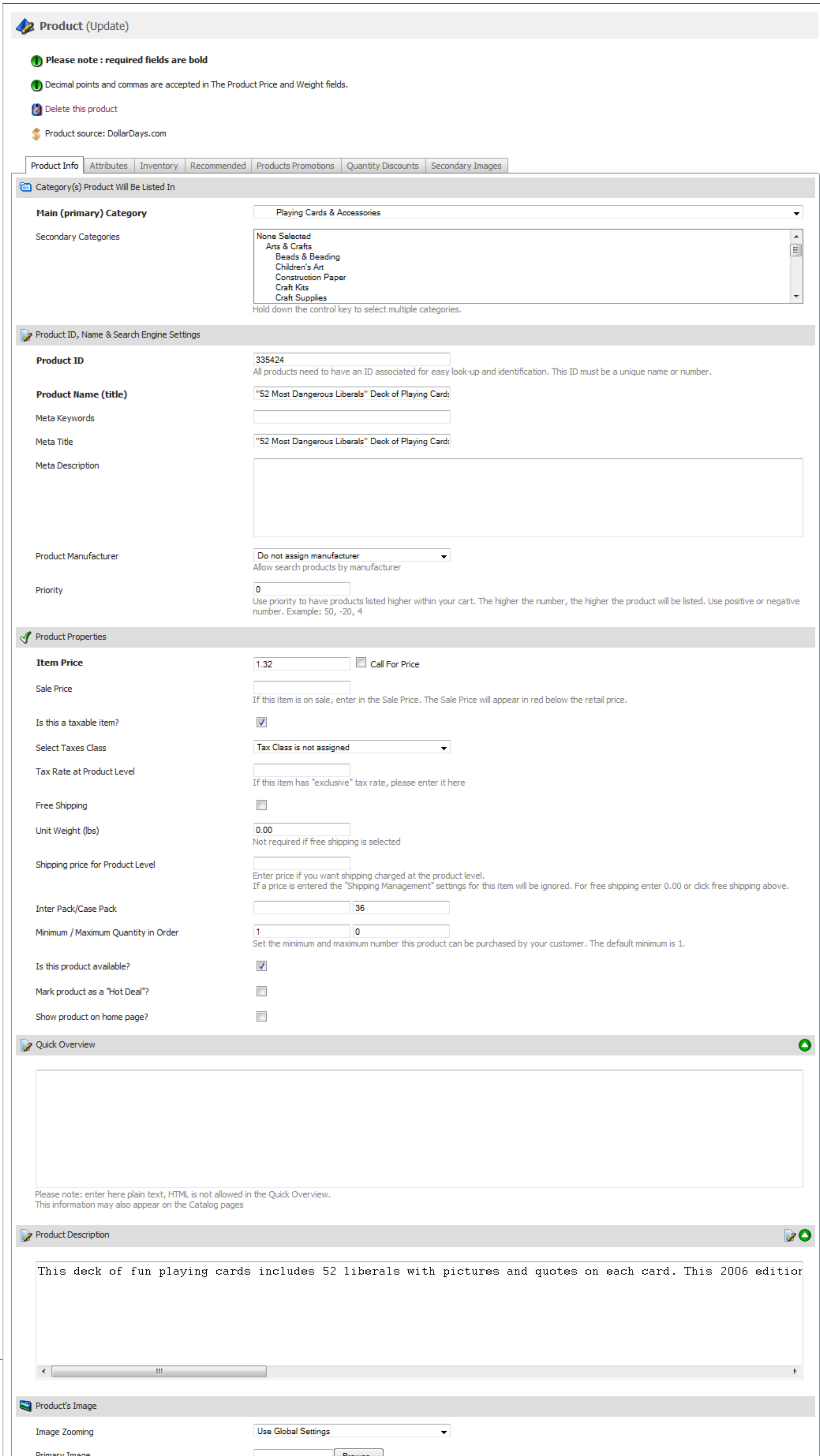

Product (Update)
Please note : required fields are bold
Decimal points and commas are accepted in The Product Price and Weight fields.
Delete this product
Product source: DollarDays.com
Product Info
Attributes
Inventory
Recommended
Products Promotions
Quantity Discounts
Secondary Images
Category(s) Product Will Be Listed In
Main (primary) Category
Playing Cards & Accessories
Secondary Categories
None Selected
Arts & Crafts
Beads & Beading
Children's Art
Construction Paper
Craft Kits
Craft Supplies
Hold down the control key to select multiple categories.
Product ID, Name & Search Engine Settings
Product ID
335424
All products need to have an ID associated for easy look-up and identification. This ID must be a unique name or number.
Product Name (title)
"52 Most Dangerous Liberals" Deck of Playing Card:
Meta Keywords
Meta Title
"52 Most Dangerous Liberals" Deck of Playing Card:
Meta Description
Product Manufacturer
Do not assign manufacturer
Allow search products by manufacturer
Priority
0
Use priority to have products listed higher within your cart. The higher the number, the higher the product will be listed. Use positive or negative number. Example: 50, -20, 4
Product Properties
Item Price
1.32
Call For Price
Sale Price
If this item is on sale, enter in the Sale Price. The Sale Price will appear in red below the retail price.
Is this a taxable item?
Select Taxes Class
Tax Class is not assigned
Tax Rate at Product Level
If this item has "exclusive" tax rate, please enter it here
Free Shipping
Unit Weight (lbs)
0.00
Not required if free shipping is selected
Shipping price for Product Level
Enter price if you want shipping charged at the product level.
If a price is entered the "Shipping Management" settings for this item will be ignored. For free shipping enter 0.00 or click free shipping above.
Inter Pack/Case Pack
36
Minimum / Maximum Quantity in Order
1
0
Set the minimum and maximum number this product can be purchased by your customer. The default minimum is 1.
Is this product available?
Mark product as a "Hot Deal"?
Show product on home page?
Quick Overview
Please note: enter here plain text, HTML is not allowed in the Quick Overview.
This information may also appear on the Catalog pages
Product Description
This deck of fun playing cards includes 52 liberals with pictures and quotes on each card. This 2006 editior
Product's Image
Image Zooming
Use Global Settings

Figure 2-5-4: Product (Update) Page

8. If you want to reset the form, click on the **Reset form** button.
9. Click **Save changes** button to update the information. You will get a confirmation message that the product has been successfully updated.

Note: Click on the links below to know more about the **Attributes**, **Recommended Family**, **Product Promotions**, **Quantity Discounts** and **Secondary Images** for a product.

Attributes 26
Recommended Family 33
Product Promotions 34
Quantity Discounts 36
Secondary Images 38

2.2.3 Product Attributes Overview

Product attributes allow you to provide your customers with the choices for any of the products. Examples include size, color, type, etc. You can use this section to manage various functions related to the management of product attributes and also for assigning global product attributes 55 with a product. To know more about creating and managing product attributes, click on the links below.

Add a Product Attribute 26
Edit a Product Attribute 27
Delete a Product Attribute 29

2.2.3.1 Add a Product Attribute

You can add attributes under an existing product. You can create unlimited number of attributes for any product. To **add a product attribute**, follow the steps:

1. Open 23 the **Product (Update)** page.
2. In the **Product (Update)** page, click **Attributes** tab to open Add a New Attribute 27 page.

Note: You can also **delete the product** from **Add a New Attribute** page. To **delete the product**, click **Delete this product** link on top of the page.

3. Scroll down to **Add a New Attribute** and enter the following information to add product attributes:
   a. **Attribute Name:** Type the name of the category.
   b. **Attribute Caption:** Type the text that will define the attribute on the Add Product 18 page.
   c. **Priority:** Use priority to have products listed higher within Springboard

Promocart. You can select this on a scale of 1 to 10, where 1 is given the highest priority. The higher the number, the higher the product will be listed.

d. **Attribute Type:** Select the attribute type, that is, Drop-down, or text input from the drop down menu.

e. **Options (for Drop-Down):** If you select Drop-down as an Attribute Type. Type the options that you want should appear for selection on the product page as drop down menu.

f. **Text Length (for Text Input):** If you select text input as an attribute type. Enter the text length.

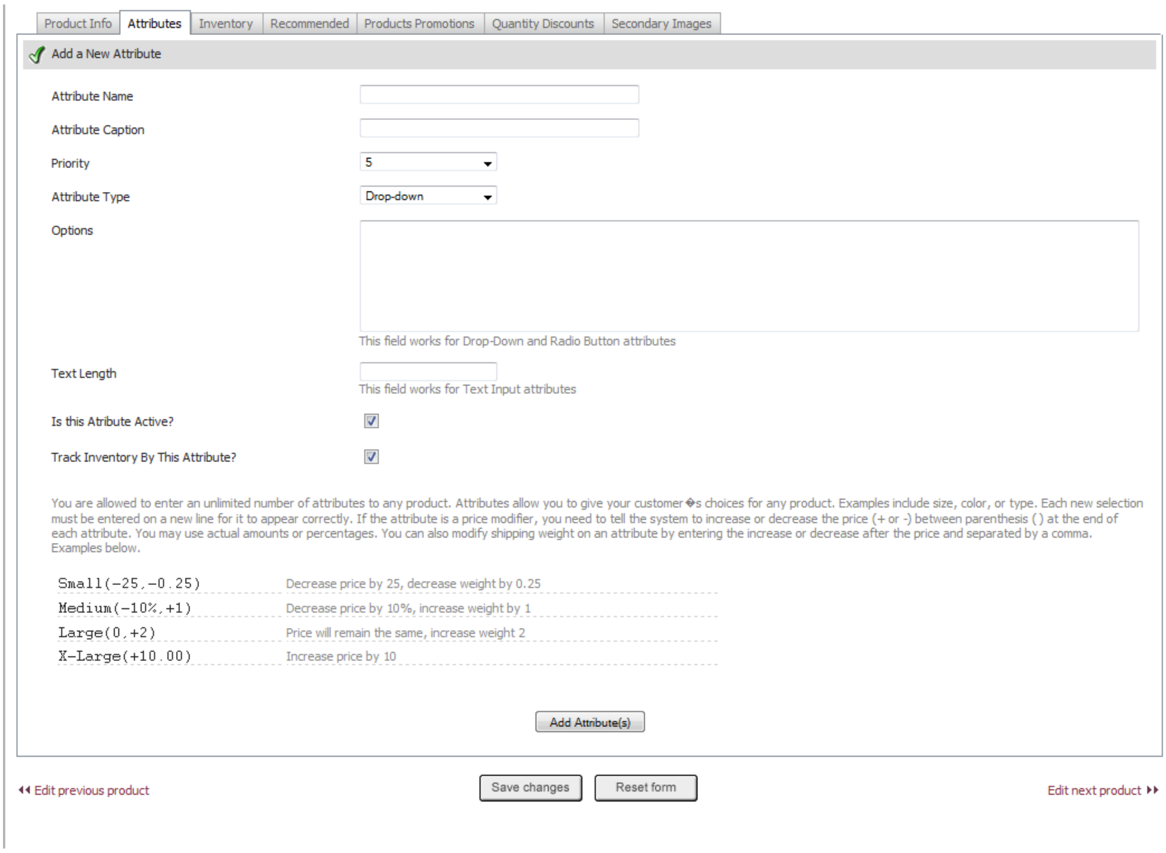


Figure 2-6-1: Add a New Attribute

4. Click the **Add Attribute(s)** button to add attributes under a product.

Note: To know about **assigning Global Attributes with a product**, click here 55.

2.2.3.2 Edit a Product Attribute

You can use this option to edit product attributes. To **edit a product attribute**, follow the steps:

1. Open 23 the **Product (Update)** page.

2. In the **Product (Update)** page, click **Attributes** tab.
3. Scroll down to **Product Attributes**, as shown in the Figure 2-7-1 29 below.

Note: You can also **Assign Existing Global Attributes with a product**, so that it would appear every time you add a product. To know how to **Assign Existing Global Attributes with a product**, click here 55.

Un-check the **Is Active** check box in **Product Attributes** to hide the product attribute on the site. By default, the box is checked and the attribute is active on the site.

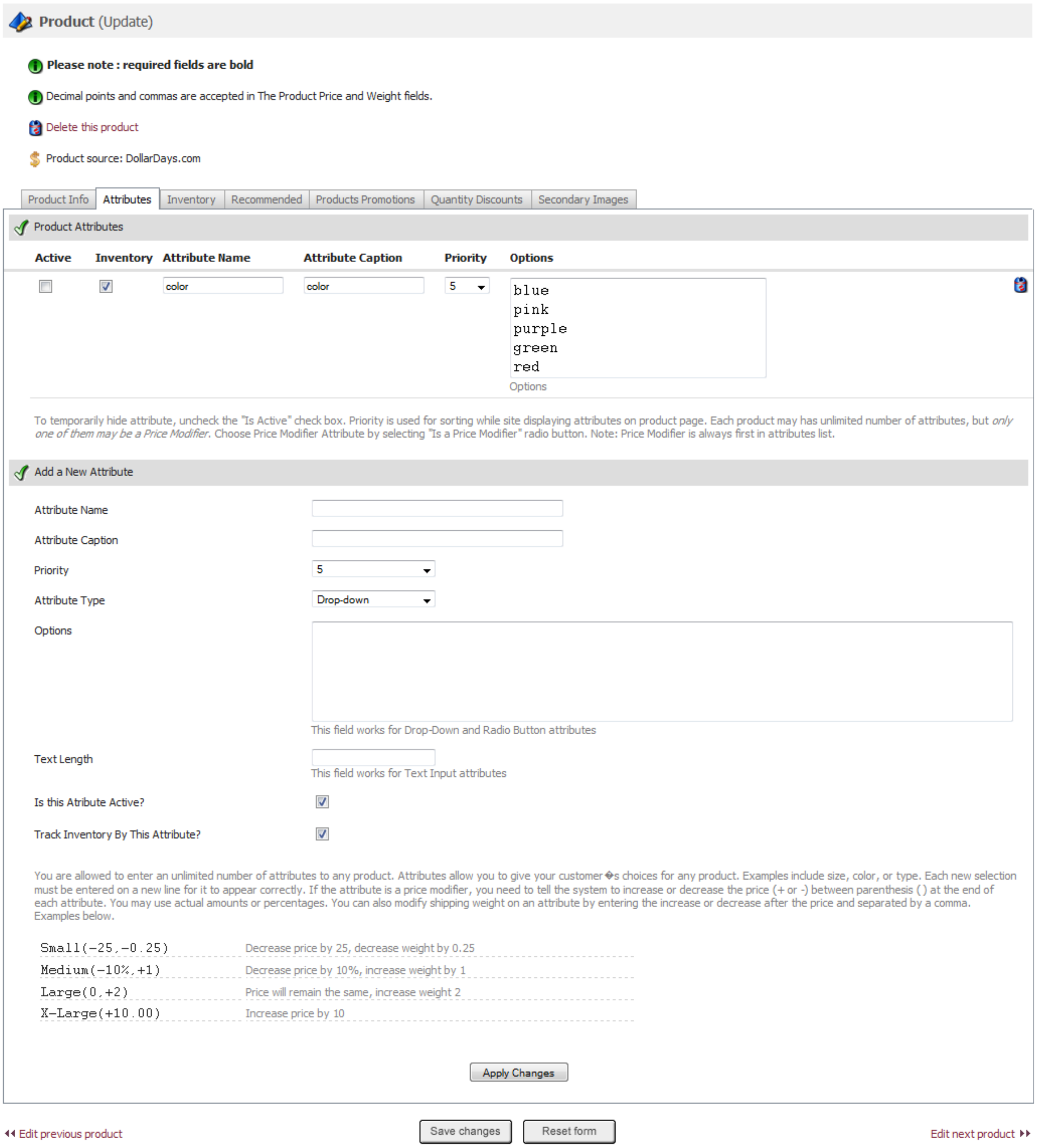


Figure 2-7-1: Product Attributes

4. You can modify all the parameters under the **Product Attributes**.
5. If you want to reset the form, click on the **Reset form** button.
6. Click **Save changes** button at the bottom of the page, to update the information.

2.2.3.3 Delete a Product Attribute

You can use this option to delete product attributes. To **delete a product attribute**, follow the steps:

1. Open 23 the **Product (Update)** page.
2. In the **Product (Update)** page, click **Attributes** tab.
3. Scroll down to **Product Attributes** and click the **Delete** link under that attribute, which you want to remove.

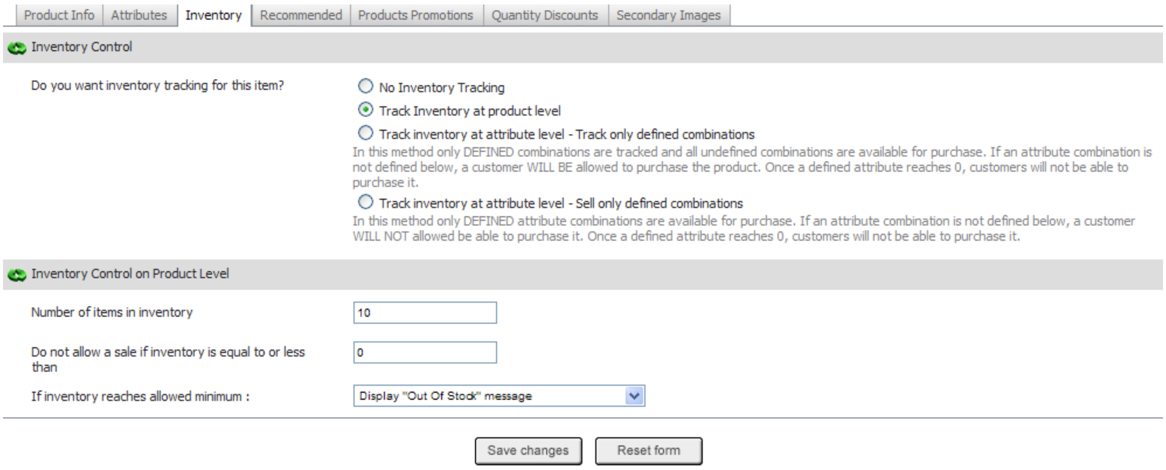
A pop up appears asking for confirmation, as shown in the Figure 2-8-1 below.

Figure 2-8-1: Delete Confirmation

4. Confirm deletion process, by clicking **OK** button.

2.2.3.4 Inventory Control

Track Inventory for this item At the product level.



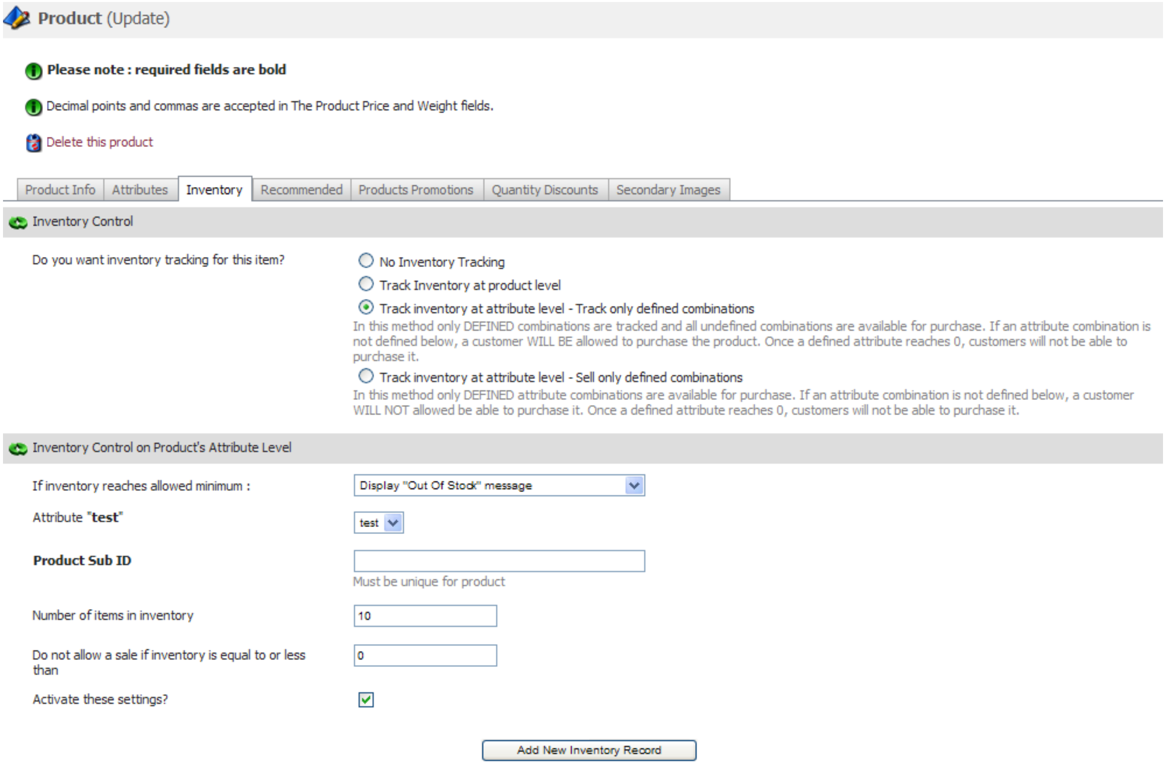
1. Do you want inventory tracking? If so at what level?

   A. Track Inventory at product level

1. Number of items in inventory: If you select the Inventory Tracking, enter the number of products you want to have in the inventory. The system will automatically decrease this value any time a user will purchase a product from your store.

2. Stop sale if the number of items is less: If you select the Inventory Tracking, specify a value after which the system will automatically stop product sale when the number of items in inventory will be less than that value you will enter here.

3. If inventory reaches allowed minimum: If a product reaches the minimum specified value in the inventory, select from the drop-down menu Do not display item on user site if you want to remove the product automatically from the cart or Out of Stock message if you want to display a message to a customer.



B. Track inventory at attribute level - Track only defined combinations - In this method only DEFINED combinations are tracked and all undefined combinations are available for purchase. If an attribute combination is not defined below, a customer WILL BE allowed to purchase the product. Once a defined attribute reaches 0, customers will not be able to purchase it.

1. If inventory reaches allowed minimum: If a product reaches the minimum specified value in the inventory, select from the drop-down menu Do not display item on user site if you want to remove the product automatically from the cart or Out of Stock message if you want to display a message to a customer.

2. Attribute - Select which attribute this inventory control is for.

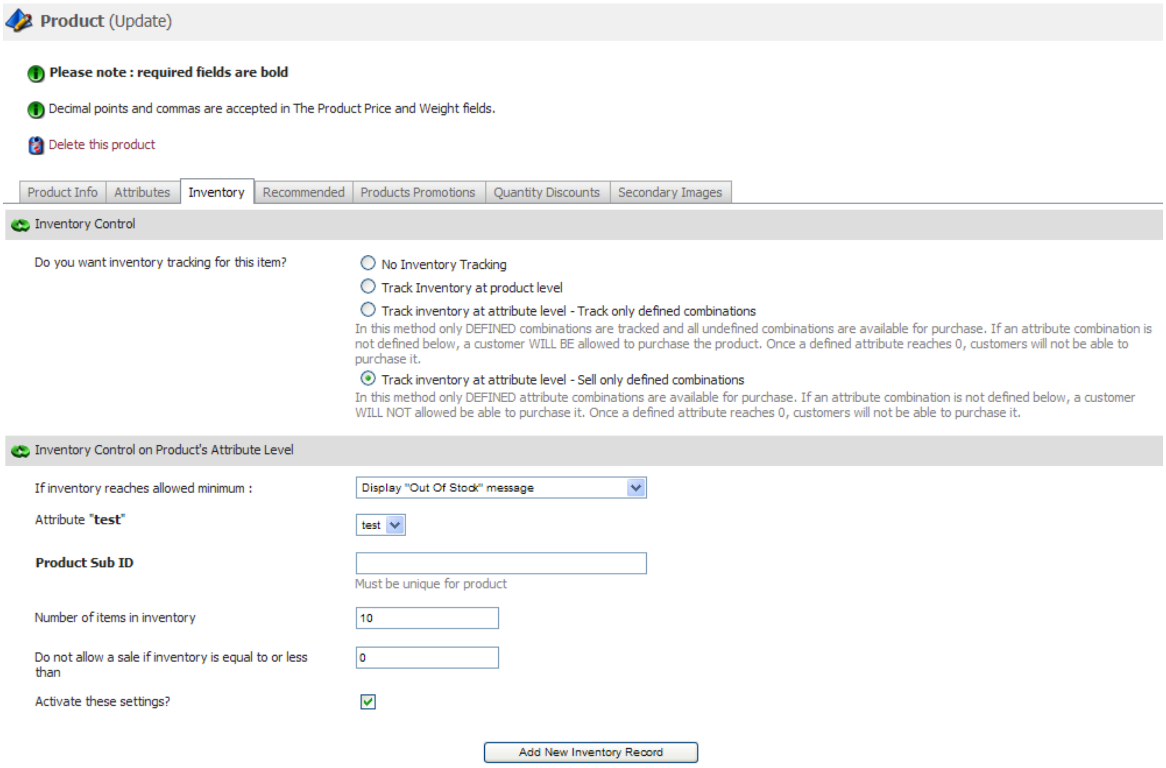
3. Product Sub ID - Must be unique for product and different than the man product id or any other product or sub product id.

4. Number of items in inventory: If you select the Inventory Tracking, enter the number of products you want to have in the inventory.
The system will automatically decrease this value any time a user will purchase a product from your store.

5. Stop sale if the number of items is less: If you select the Inventory Tracking, specify a value after which the system will automatically stop product sale when the number of items in inventory will be less than that value you will enter here.

6. If inventory reaches allowed minimum: If a product reaches the minimum specified value in the inventory, select from the drop-down

menu Do not display item on user site if you want to remove the product automatically from the cart or Out of Stock message if you want to display a message to a customer.



C. Track inventory at attribute level - Sell only defined combinations - In this method only DEFINED attribute combinations are available for purchase. If an attribute combination is not defined below, a customer WILL NOT allowed be able to purchase it. Once a defined attribute reaches 0, customers will not be able to purchase it.

1. If inventory reaches allowed minimum: If a product reaches the minimum specified value in the inventory, select from the drop-down menu Do not display item on user site if you want to remove the product automatically from the cart or Out of Stock message if you want to display a message to a customer.

2. Attribute - Select which attribute this inventory control is for.

3. Product Sub ID - Must be unique for product and different than the man product id or any other product or sub product id.

4. Number of items in inventory: If you select the Inventory Tracking, enter the number of products you want to have in the inventory. The system will automatically decrease this value any time a user will purchase a product from your store.

5. Stop sale if the number of items is less: If you select the Inventory Tracking, specify a value after which the system will automatically stop product sale when the number of items in inventory will be less than that value

you will enter here.

6. If inventory reaches allowed minimum: If a product reaches the minimum specified value in the inventory, select from the drop-down menu Do not display item on user site if you want to remove the product automatically from the cart or Out of Stock message if you want to display a message to a customer.

2.2.4 Recommend Family for a Product

Product Families give you the ability to add recommended products to your product pages. You can use this section to recommend a product family with an existing or new product. But, for doing this, there must be some existing recommended product families. To **recommend family for a product**, follow the steps:

Note: To know how to **create** and **manage** a **recommended product family**, click here 56.

1. Open the Product (Insert) 17 or Product (Update) 23 page.
2. In the Product (Insert) 18 or Product (Update) 26 page, click **Recommended** tab to open Product Families 34 page.

Note: You can also **delete the product** from the **Product Families** page. To **delete the product**, click **Delete this product** link on top of the page.

3. You can view the available product families and recommended product families for the product, if any, as shown in the Figure 2-9-1.

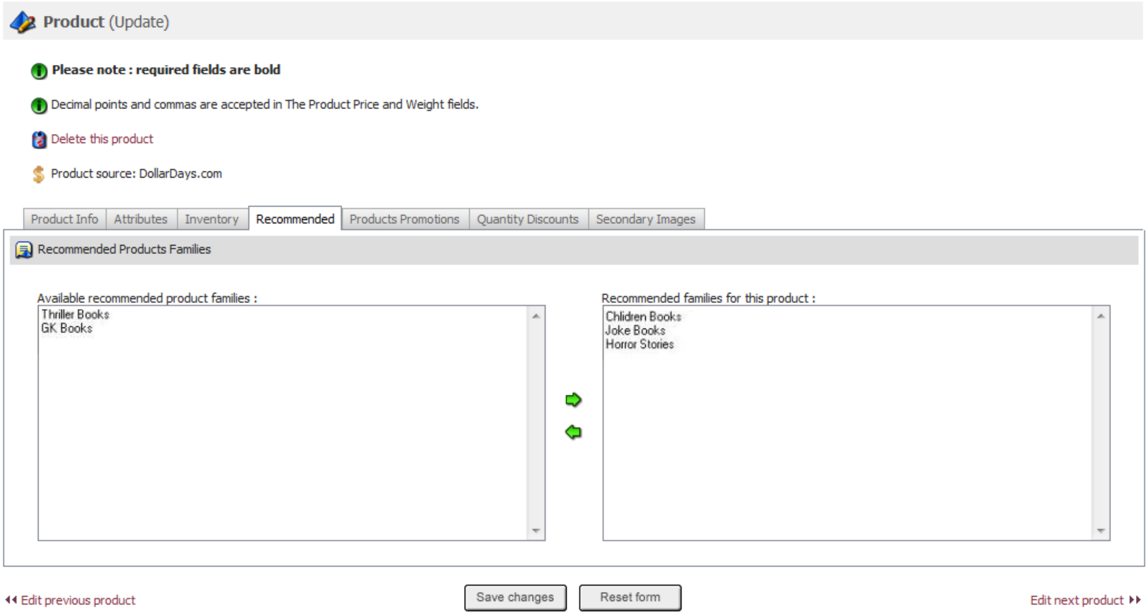


Figure 2-9-1: Product Families

4. To recommend family for this product, select a **product family** by clicking on it from the **Available recommended product families**.
5. Click icon to assign selected family with the product.

Note: You can also unassign a family with product. To unassign, select a product family by clicking on it from the **Recommended families for this product** and then click icon.

6. If you want to reset the form, click on **Reset form** button.
7. Click **Save changes** button to save the information.

2.2.5 Product Promotions

Product Promotion is essential to keep a product-oriented business ahead of its competition. You can use this section to promote an existing or new product by offering free products with it on buying a certain quantity of that product. To **promote a product**, follow the steps:

1. Open the Product (Insert) 17 or Product (Update) 23 page.
2. In the Product (Insert) 18 or Product (Update) 26 page, click **Product Promotions** tab to open Product Promotions 35 page.

Note: You can also **delete the product** from the **Product Promotions** page. To **delete the product**, click **Delete this product** link on top of the page.

3. Enter the following information in the **Product Promotions** page:
    a. **Minimum Number of this Product:** Enter the minimum quantity of this product a customer must order, to receive the free product(s). By default, 1 is selected.
    b. **Free Product Quantity:** Enter the quantity of the free product that the customer will receive, once he/she buys the minimum order needed to receive the free product. By default, 1 is selected.
    c. **Maximum number of free product:** Enter the maximum number of free product a customer is allowed to receive per order. By default, 999 is selected.
    d. **Charge shipping for this free product:** Select **Yes** from the drop down menu if there are shipping charges for this free product, otherwise select **No**. By default, **No** is selected.
    e. **Type in the product name or ID of the free product:** Enter the free product name or ID, to automatically search the free product from the database. Then click on the **free product**, to add it to the free product list.

Note: You can also **delete a free product** by selecting it from the **free products list** and then clicking **Remove Selected** link below the list of free products.

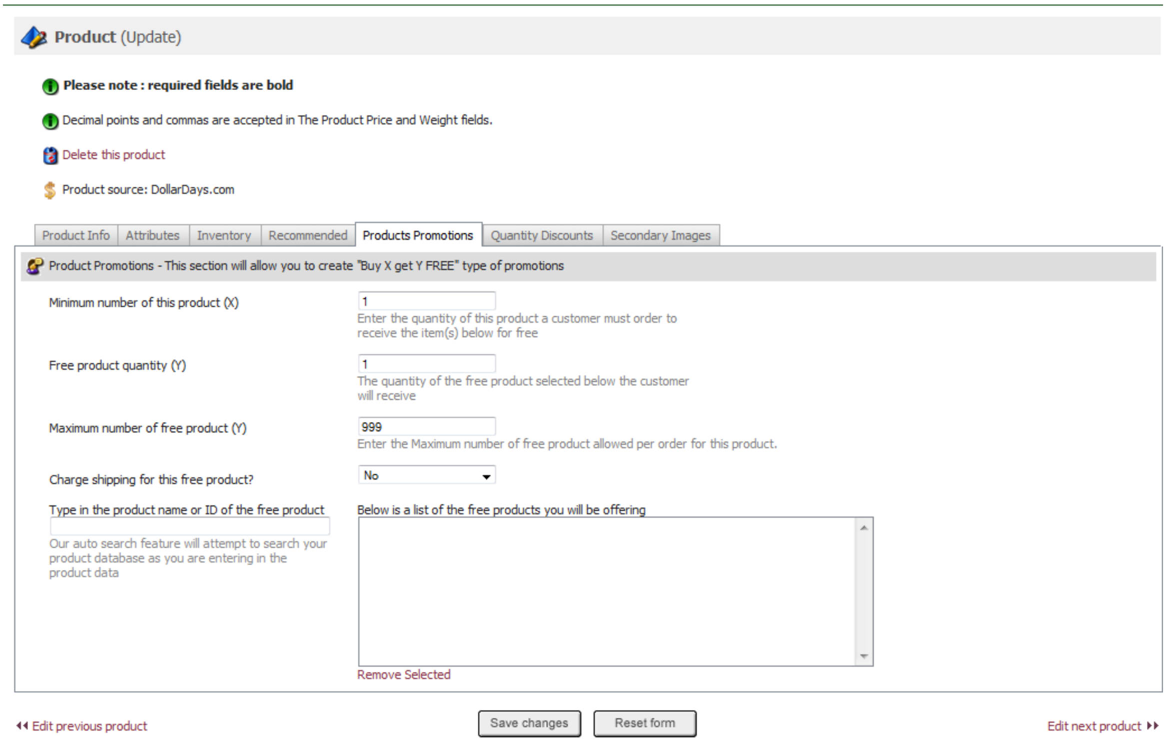


Figure 2-10-1: Product Promotions

4. If you want to reset the form, click on the **Reset form** button.
5. Click **Save changes** button to save the information.

2.2.6 Quantity Discounts Overview

Quantity Discounts are a requirement for any business looking to expose its products to the consumer marketplace. You can use this section to offer discounts on a product by adding quantity range for that product. To know more, click on the links below.

2.2.6.1 Add a New Quantity Range

You can use this option to add a new quantity range to offer discount on a product. To **add a new quantity range**, follow the steps:

1. Open 23 the **Product (Update)** page.
2. In the **Product (Update)** page, click **Quantity Discounts** tab to open Quantity Discounts 36 page.

Note: You can also **delete the product** from the **Quantity Discounts** page. To **delete the product**, click **Delete this product** link on top of the page.

3. Enter the following information under **Add a New Quantity Range**:
    a. **Min Range:** Enter the minimum quantity to avail the discount.
    b. **Max Range:** Enter the maximum quantity to avail the discount.
    c. **Discount:** Enter how much discount will be provided on the product under the quantity range and then select from the drop down menu the discount is in **%** or **$**.
    d. **Wholesale:** Check the box if the product is available for wholesale. Otherwise, let it remain unchecked.
    e. **Free Shipping:** Check the box if there are no shipping charges for the product. Otherwise, let it remain unchecked if there are shipping charges for the product.

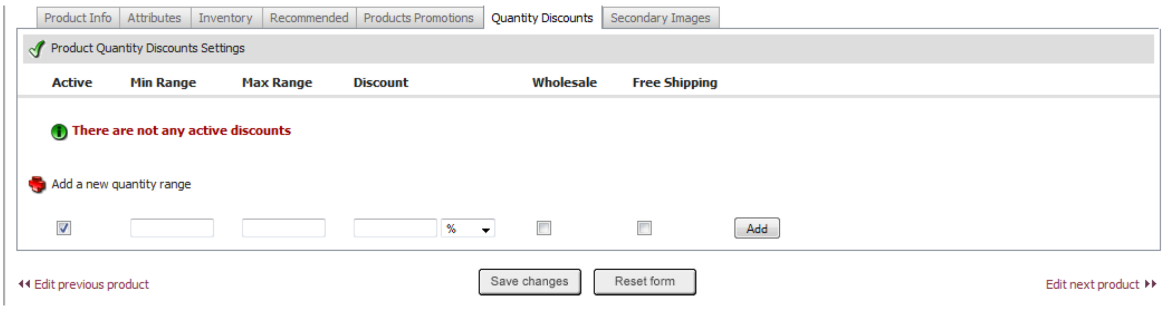


Figure 2-11-1: Quantity Discounts

4. Click **Add** button under **Action** to add a new quantity range.

2.2.6.2 Edit a Quantity Range

You can use this option to edit a quantity range, to modify the discount offered to a product. To **edit a quantity range**, follow the steps:

1. Open 23 the **Product (Update)** page.
2. In the **Product (Update)** page, click on the **Quantity Discounts** tab.
3. You can modify all the information under **Quantity Discounts** for the existing quantity range.

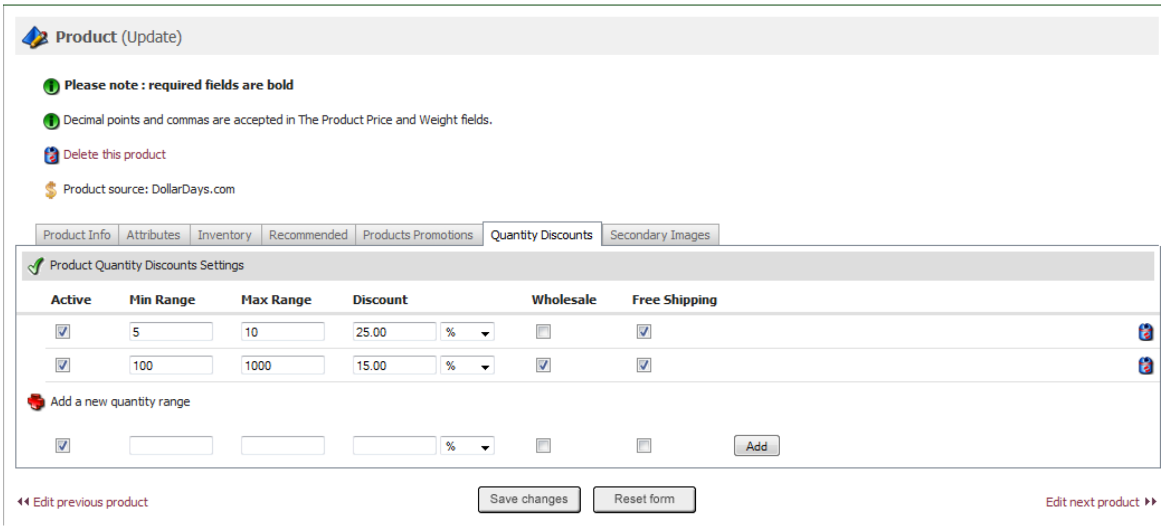


Figure 2-12-1: Edit Quantity Discounts

4. If you want to reset the form, click on the **Reset form** button.
5. Click **Save changes** button to update the information.

2.2.6.3 Delete a Quantity Range

You can use this option to delete a quantity range, to remove the discount offered on a product. To **delete a quantity range**, follow the steps:

1. Open 23 the **Product (Update)** page.
2. In the **Product (Update)** page, click on the **Quantity Discounts** tab.
3. Under **Quantity Discounts**, check the box for the quantity range you want to remove and click on the **Delete** link.

A pop up appears asking for confirmation, as shown in the Figure 2-13-1 below.

Figure 2-13-1: Delete Confirmation

4. Confirm deletion process, by clicking **OK** button.

2.2.7 Secondary Images Overview

You can use this section to add more than one image for an existing or new product. In addition, you can also decide whether the image should be visible on the user site or not. To know more about creating and managing these images, click on the links below.

Add Secondary Image(s) 38
Edit Secondary Image(s) 39
Delete a Secondary Image 39

2.2.7.1 Add Secondary Image(s)

You can use this option to add secondary image(s) for a product. To **add secondary image(s) for a product**, follow the steps:

1. Open the Product (Insert) 17 or Product (Update) 23 page.
2. In the Product (Insert) 18 or Product (Update) 26 page, click on the **Secondary Images** tab to open Upload a New Secondary Image(s) 38 page.

Note: You can also **delete the product** from the **Upload a New Secondary Image(s)** page. To **delete the product**, click **Delete this product** link on top of the page.

3. Click **Browse** under **Upload a New Secondary Image(s)** and navigate to the image that you would like to upload for the product.

Note: Uncheck the **Is this image visible on user site box**, if you want to hide the image on the user site. Otherwise, let it remain checked if you want this image to be visible on the user site. By default, the box is checked.

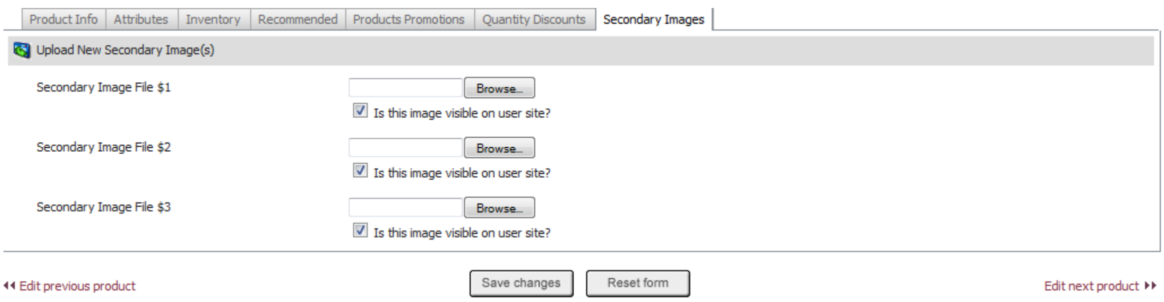


Figure 2-14-1: Upload a New Secondary Image(s)

4. If you want to reset the form, click on the **Reset form** button.

5. Click **Save changes** button to upload the secondary image(s) for a product.

2.2.7.2 Edit Secondary Image(s)

You can use this option to decide whether to display the secondary image(s) for a product on the user site or not. To **edit secondary image(s) for a product**, follow the steps:

1. Open the Product (Insert) 17 or Product (Update) 23 page.
2. In the Product (Insert) 18 or Product (Update) 26 page, click on the **Secondary Images** tab.
3. You can view the added secondary image(s) under **Product Secondary Images**, as shown in the Figure 2-15-1.

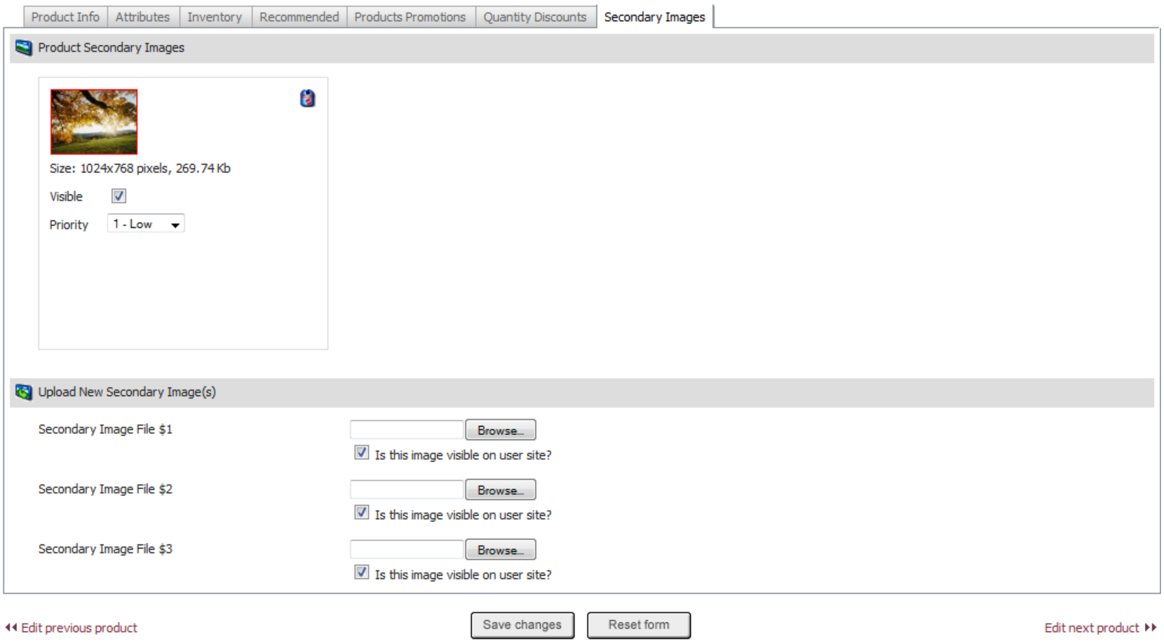


Figure 2-15-1: Product Secondary Images

4. Under **Product Secondary Images**, uncheck the **Is this image visible on user site** box, if you want to hide the image on the user site. Otherwise, let it remain checked to make the image visible on the user site. By default, the box is checked.
5. If you want to reset the form, click on the **Reset form** button.
6. Click **Save changes** button to update the information.

2.2.7.3 Delete a Secondary Image

You can use this option to delete the secondary image for a product. To **delete a secondary image for a product**, follow the steps:

1. Open the Product (Insert) 17 or Product (Update) 23 page.

2. In the Product (Insert) 18 or Product (Update) 26) page, click **Secondary Images** tab.
3. Under **Product Secondary Images**, click on the **Delete this image** link for the secondary image you want to remove.

A pop up appears asking for confirmation, as shown in the Figure 2-16-1 below.

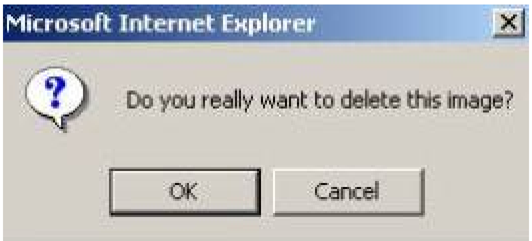
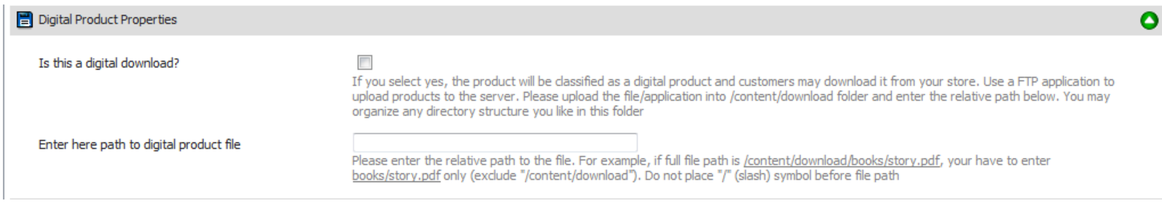


Figure 2-16-1: Delete Confirmation

4. Confirm deletion process, by clicking **OK** button.

2.2.8 Digital Downloads

The Digital Downloads feature allow you to sell downloadable items to your customers. To activate this feature you must go to Digital Products 122 area in the cart which is located under **'Cart Settings'** > **'Global Cart Settings'** > **'Digital Products'**. Once activated, you will notice another section within the **Add Product** area of Springboard Promocart.



This area will allow you to enter in the URL to the digital product located on your server. When this product is ordered, Springboard Promocart will present the customer with a "masked" URL to the product so they can download the product. The customer will never see the true location of the product, preventing unauthorized downloads of your product.

2.3 Manufacturers

You can use this section to add and manage the product manufacturers details with their logo. In addition, you can also decide whether the manufacturer should be visible on the user site or not. Once the manufacturer is visible on the user site, the customer can find all the products under that manufacturer only by selecting the manufacturer name from the drop-down menu. So, the manufacturers will help the customers to find products more easily. To know more about creating and managing the manufacturers, click on the links below.

2.3.1 Add a Manufacturer

You can use this option to add a product manufacturer. To **add a new product manufacturer**, follow the steps:

1. Click **Manufacturers**, as shown in the Figure 2-18-1 below.

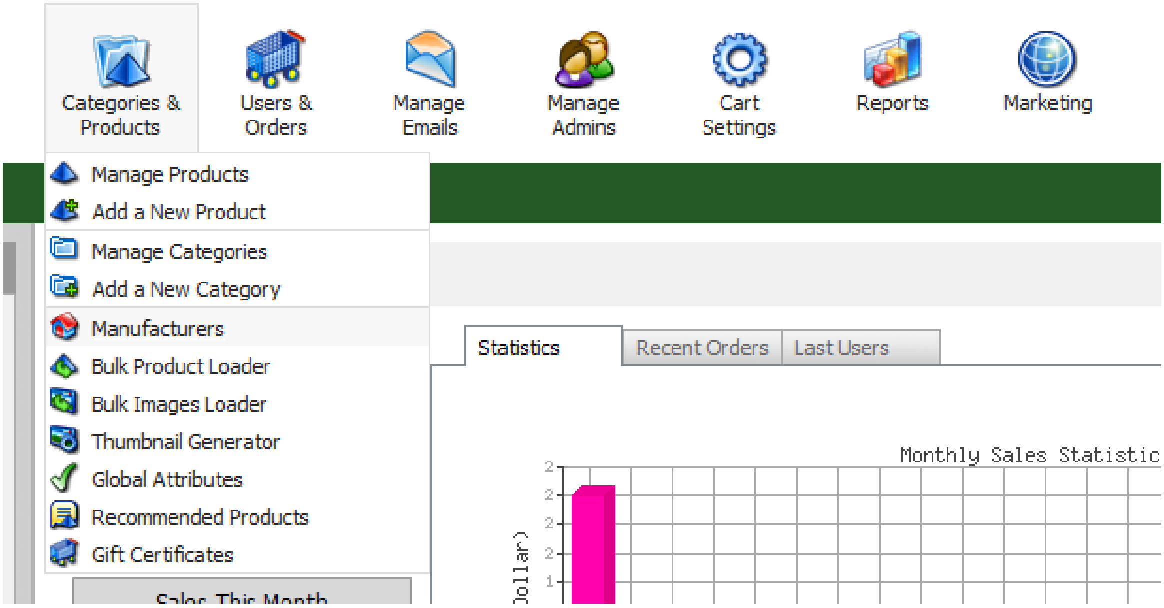


Figure 2-18-1: Manufacturers

The **Manufacturers Settings** page opens, as shown in the Figure 2-18-2 42 below.

Note: You can also open the **Manufacturers Settings** page directly, by clicking on **Manufacturers** link in the Admin Area Home page 8.

2. Scroll down to **Add a New Manufacturer** and then enter the following information:
   a. **Manufacturer Name:** Enter the product manufacturer name.

b. **Manufacturer ID:** Enter the product manufacturer ID.
c. **Logo Image:** Click **Browse** and navigate to the logo that you would like to upload for the product manufacturer. The logo image can be in JPG, PNG or GIF format.

Note: Check the **Available** box for a product manufacturer to view the selected manufacturer name on the user site. Otherwise, let it remain unchecked to hide the product manufacturer name on the user site.

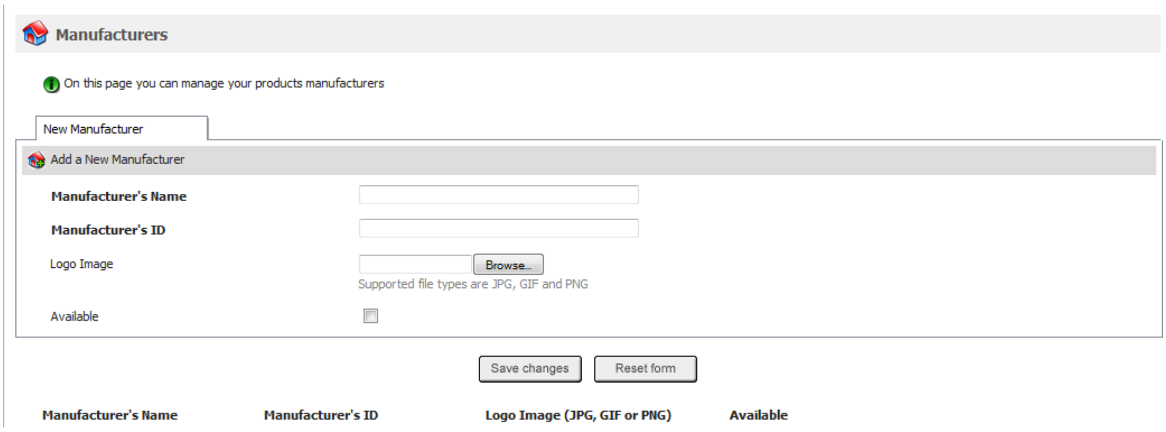


Figure 2-18-2: Manufacturers Settings

3. Click **Save Changes** button and repeat **Step 2 until you are done adding Manufacturers**.

2.3.2 Edit a Manufacturer

You can use this option to edit a manufacturer details. To **edit a manufacturer details**, follow the steps:

1. Open 41 the **Manufacturers Settings** page with existing manufacturers, as shown in the Figure 2-19-1.
2. You can modify all the parameters for an existing manufacturer.

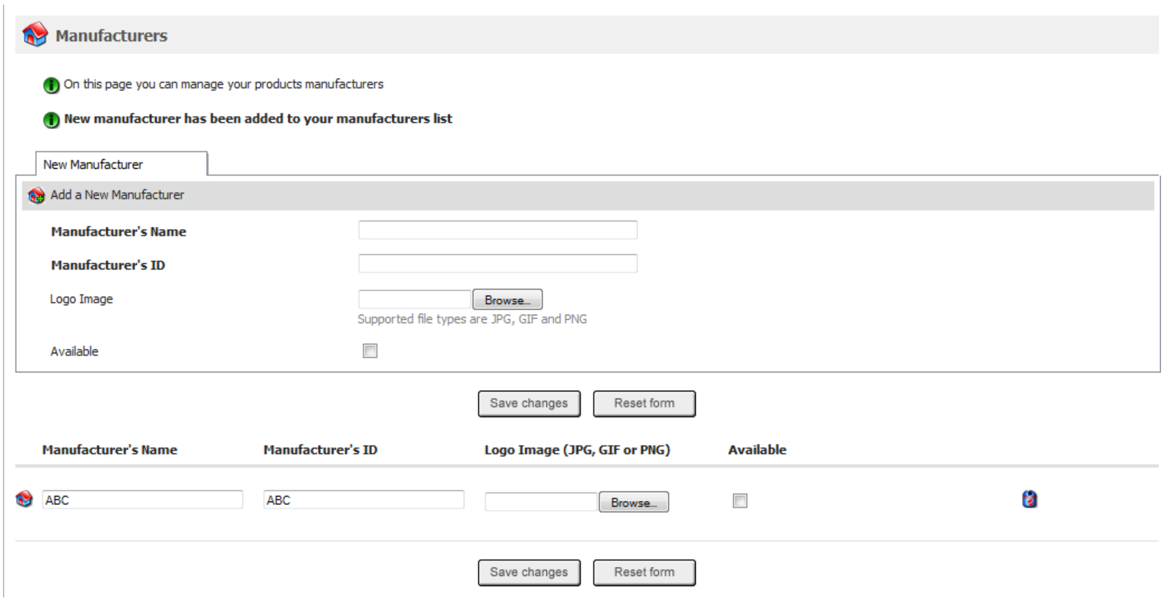


Figure 2-19-1: Manufacturers Settings page with existing manufacturers

3. If you want to reset the form, click on the **Reset form** button.
4. Click **Save changes** button to update the information.

2.3.3 Delete Manufacturers

You can use this option to delete a product manufacturer. To **delete a product manufacturer**, follow the steps:

1. Open 41 the **Manufacturers Settings** page with existing manufacturers.
2. Click **Delete** button for a manufacturer you want to remove.

A pop up appears asking for confirmation, as shown in the Figure 2-20-1 below.

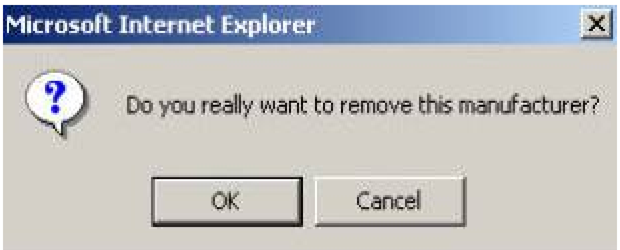


Figure 2-20-1: Delete Confirmation

3. Confirm deletion process, by clicking on **OK** button.

2.4 Bulk Uploading of Products

This section allows you to upload product data into your Springboard Promocart using a .CSV file. Most database programs (including Excel) will allow you to import or save data in this format. Once uploaded, Springboard Promocart will ask you which column represents what data type (Product ID, Product Name, Price, etc.). Springboard Promocart uses Product ID as its data key, so products with a duplicate Product ID will be overwritten with the new data. This is a 3-step process and the data will not be stored until the final step is complete.

1. Click **Bulk Products Loader**, as shown in the Figure 2-21-1 below.

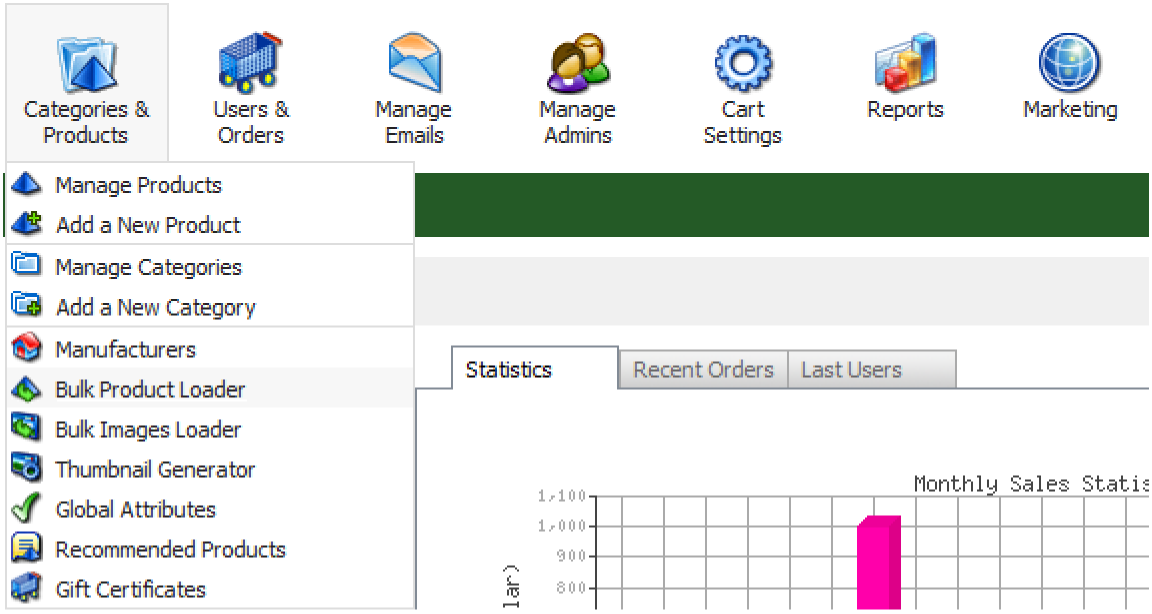


Figure 2-21-1: Bulk Products Loader

The **Bulk Uploading Of Products (Step 1 of 3)** page will open.

Note: You can also directly open the **Bulk Uploading Of Products (Step 1 of 3)** page, by clicking on **Bulk Products Loader** link in the Admin Area Home page 8.

2. **Category:** Select a **Category** that allows selecting products category with undefined category keys. The products with undefined category will be moved to this category.

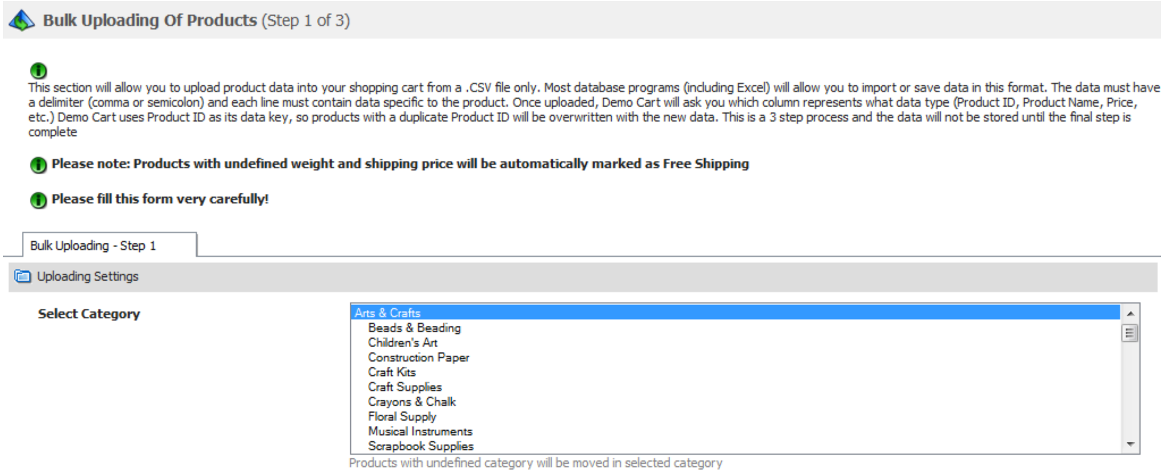


Figure 2-21-2: Default Products Category

3. **Uploading Settings:** Enter the following information:
   a. **Data Separator:** Select from the drop down menu, **comma** or **semicolon**, which is used as a data separator.
   b. **Data Update Rule:** Select from the drop down menu, if the bulk loader has a duplicate Product ID, should it overwrite the existing data with the bulk loaded data, keep it and add new, clear all the products from the selected category first and then add a new bulk loaded data or update existing products only.
   c. **Uploaded Products Availability:** Use this option to enable/disable display of these products on Springboard Promocart. Select from the drop down menu, **Products Are Available For Sale**, if you want to display these products on Springboard Promocart. Otherwise, select **Products Are Not Available For Sale**, if you do not want to display these products on Springboard Promocart. Incase you would like to display some of the products this has to be done manually.

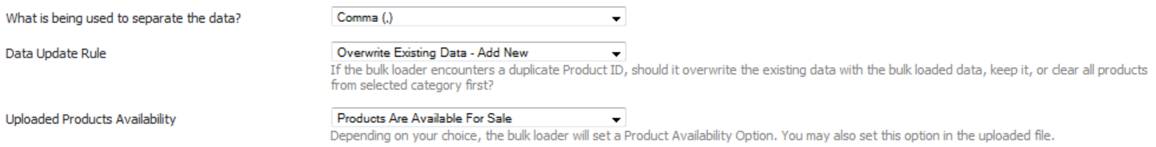


Figure 2-21-3: Uploading Settings

4. Click **Browse** to select the **.CSV file** with products data.

Figure 2-21-4: File With Products

5. If you want to reset the form, click on the **Reset form** button.
6. Click **Upload file** button to save the data.

The **Bulk Uploading Of Products (Step 2 of 3)** page will open, as shown in the

Figure 2-21-5.

Note: All blank lines and lines with wrong price will be skipped.

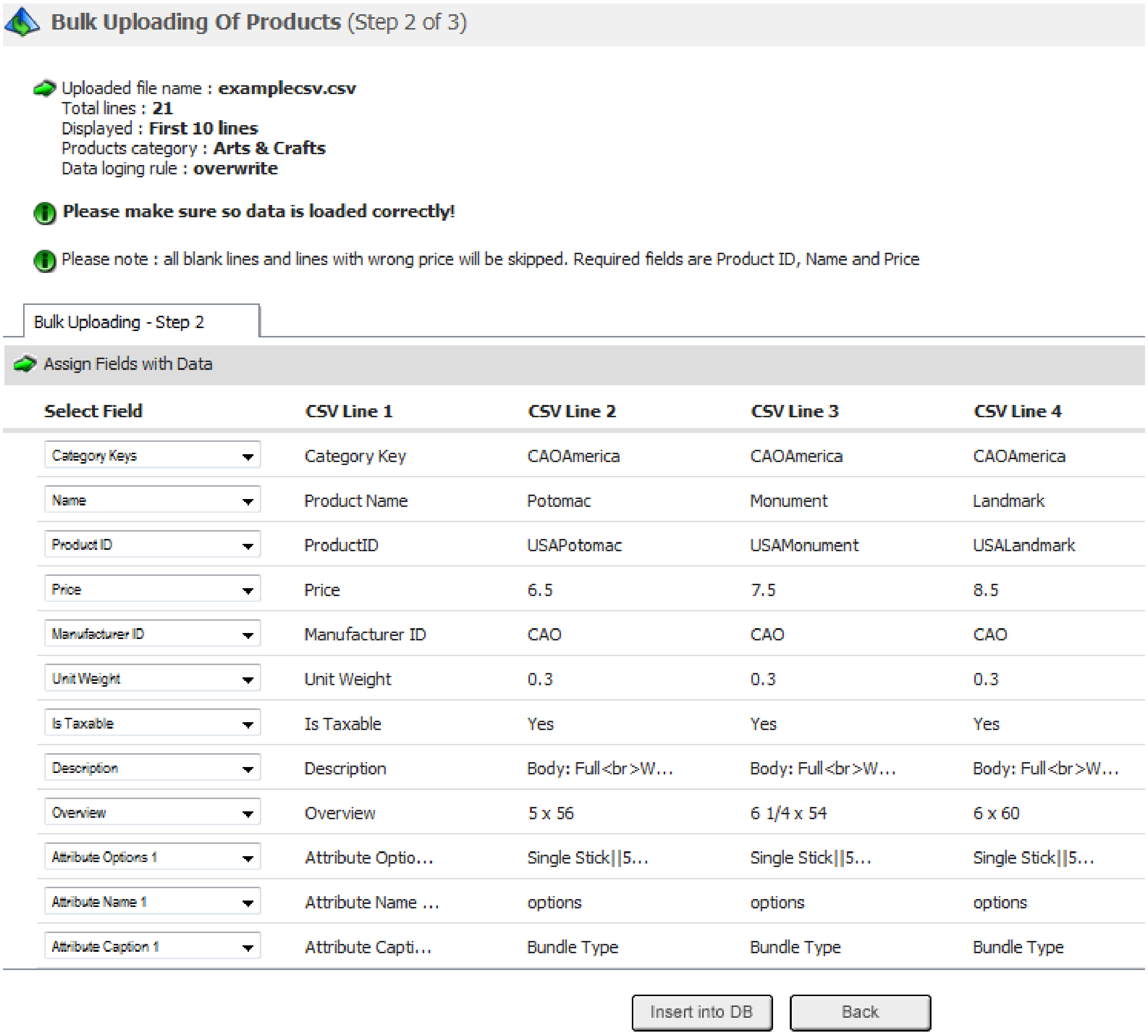


Figure 2-21-5: Bulk Uploading Of Products (Step 2 of 3)

7. Select the respective titles for the data in the lines from the **drop down menu.**
8. Click **Back** button to go back to **Bulk Uploading Of Products (Step 1 of 3)** page.
9. Click **Insert into DB** button to go to the next-step.

The **Bulk Uploading Of Products (Step 3 of 3)** page will open, as shown in Figure 2-21-6. This page will show the complete details regarding the **Bulk uploaded products**.

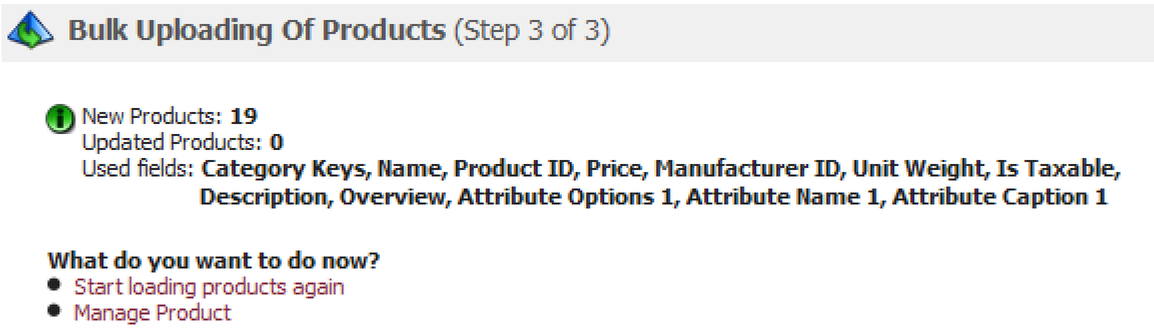


Figure 2-21-6: Bulk Uploading Of Products (Step 3 of 3)

2.5 Bulk Images Loader

Bulk Images Loader allows you to add images to products already in your Springboard Promocart. Please note, the file names need to be exactly the same as the Product ID to match the image with the product. For example, if the Product ID is **my_bike**, the image name must be my_bike.jpg or my_bike.png.

To create **Bulk Images Loader**, follow the steps:

1. Click **Bulk Images Loader**, as shown in the Figure 2-22-1 below.

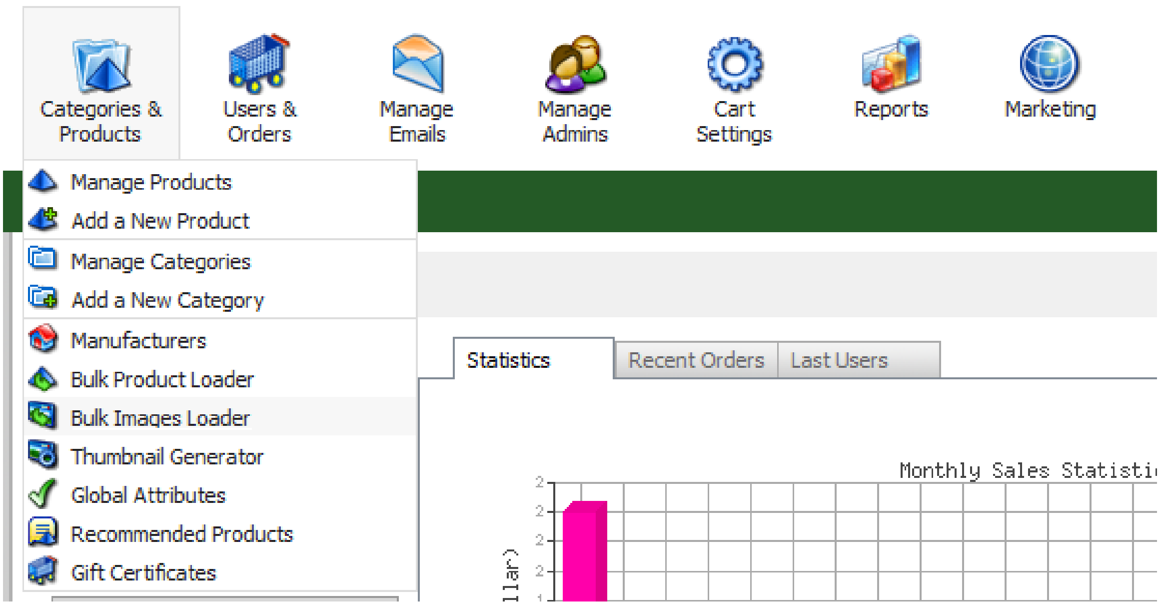


Figure 2-22-1: Bulk Images Loader

The **Bulk Images Loader** page will open, as shown in the Figure 2-22-2 48 below.

Note: You can also directly open the **Bulk Images Loader** page, by clicking on the **Bulk Images Loader** link in the Admin Area Home page 8.

2. Click **Browse** to add images in **Bulk Images Loader** page.

Note: The images can be in JPG, PNG or GIF formats.

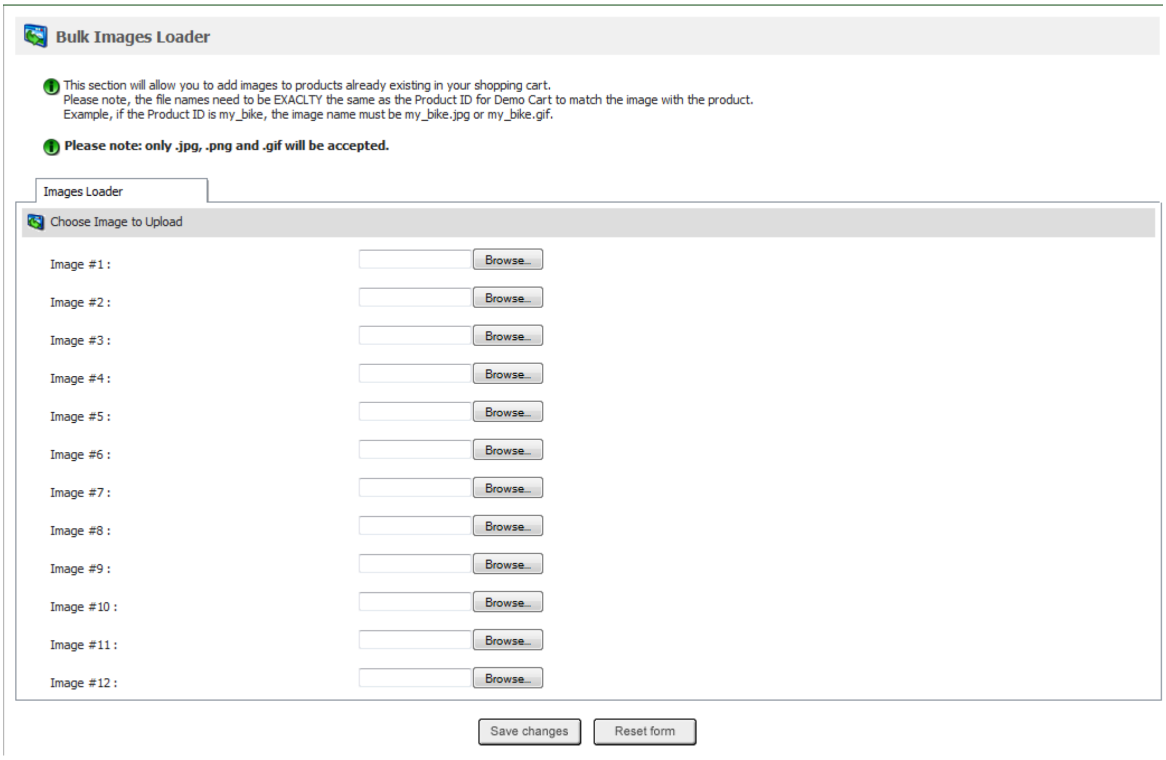


Figure 2-22-2: Images Loader

3. If you want to reset the form, click on the **Reset form** button.
4. After adding images, click **Upload images** button to upload.

2.5.1 Bulk Images Using FTP

Bulk loading images via FTP is very easy. When bulk loading images via FTP, it's important to understand Springboard Promocart uses **Product ID** as the data key for matching images to a product, therefore all images must have the same name as the **Product ID**. If they do not, and you don't want to change them manually, we suggest using another method to associate images to a product. The Bulk Images Loader 47 or adding a image when entering a product will work just as well.

Once all the images have the same name as the **Product ID,** open up your favorite FTP client and login to the server where Springboard Promocart is located. FTP to the following directory:

images/products

Upload all images into this directory.

Once complete, login back into the admin area of Springboard Promocart and run the Thumbnail Generator 49.

Every time you add images via this method, you will need to generate new thumbnails using the generator.

2.5.2 Bulk Loader FAQ

Frequently Asked Questions regarding the Bulk Loader

Q. **How many products can the bulk loader import?**

A. If your file contains more than 2000 items, we suggest breaking up the file to prevent time out issues when importing the data. The Loader itself will accept an unlimited number of items, but the server may error due to amount of time it takes to move the data from your computer to the server.

Q. **How can bulk load attributes for a product using the loader?**

A. List all options in one column and separate them using a double bar or "||". Example: Blue || Red || Yellow || Brown.

Q. **How do I bulk load images?**

A. You can use the Bulk Image Loader 47 or the FTP method 48.

Q. **How can I bulk load only new products into the cart?**

A. Select "Keep Existing - Add New" under **Data Update Rule** in the Bulk Loader.

2.6 Thumbnail Generator

Thumbnail Generator can generate thumbnail images for all the JPG and PNG image files. The thumbnail generator can only work correctly, when the image file name exactly matches the Product ID for Springboard Promocart to associate the image with the product.

To **generate thumbnail images**, follow the steps:

1. Click on **Thumbnail Generator**, as shown in the Figure 2-23-1 below.

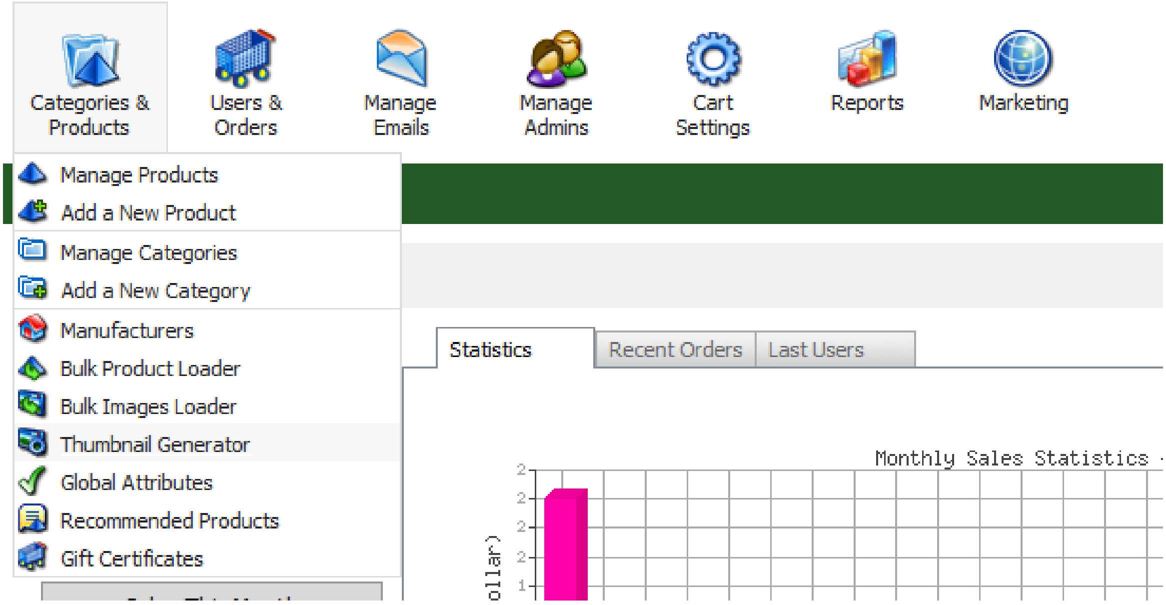


Figure 2-23-1: Thumbnail Generator

The **Thumbnail Generator (Step 1 of 3)** page will open, as shown in the Figure 2-23-2 below.

Note: You can also open the **Thumbnail Generator (Step 1 of 3)** page directly, by clicking on the **Thumbnail Generator** link in the Admin Area Home page 8.

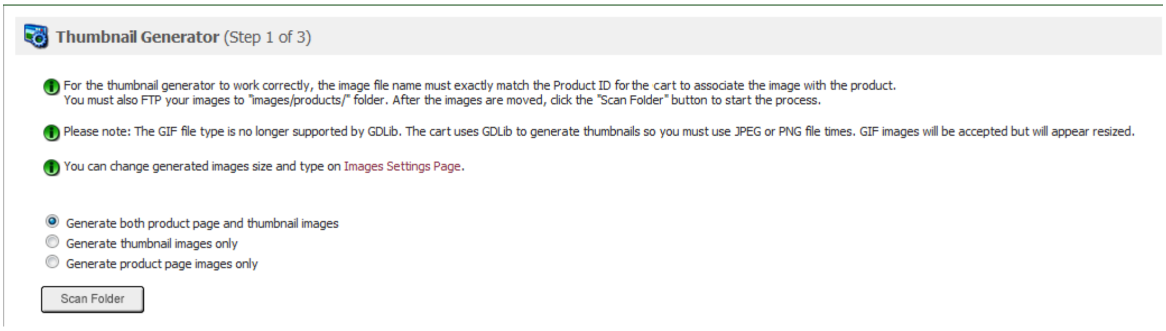


Figure 2-23-2: Thumbnail Generator (Step 1 of 3)

2. Click on the **Scan Folder** button to start the process.

Note: Thumbnail images will be created only for **JPG** and **PNG** image files as GDLib used by Springboard Promocart to generate thumbnails, no longer support the GIF images format. The GIF images will appear resized.

The **Thumbnail Generator (Step 2 of 3)** page will open with the result, as shown in the Figure 2-23-3 below.

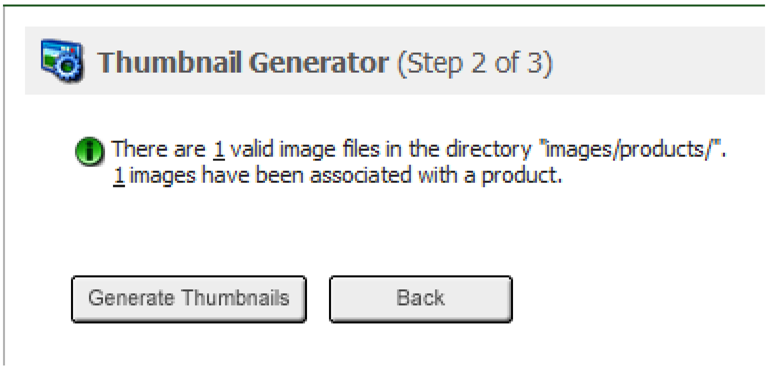


Figure 2-23-3: Thumbnail Generator (Step 2 of 3)

3. Click on the **Back** button to go back to Thumbnail Generator (Step 1 of 3) 50 [****] 50 page 50.
4. Click on the **Generate Thumbnails** button to go to the next step.

The **Thumbnail Generator (Step 3 of 3)** page will open, as shown in the Figure 2-23-4.

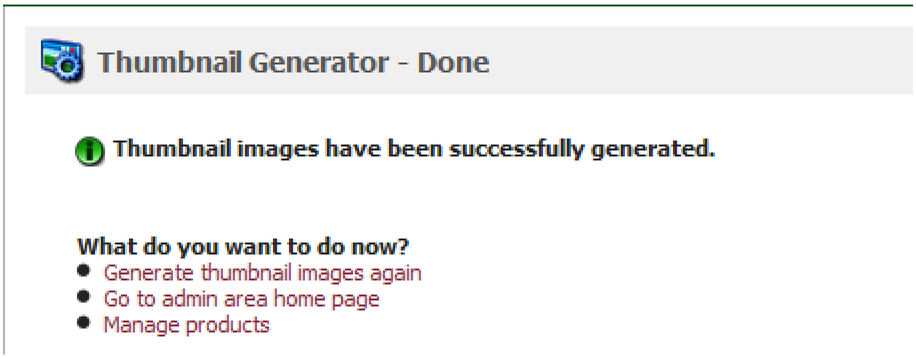


Figure 2-23-4: Thumbnail Generator (Step 3 of 3)

After some time, you will get a confirmation message that the thumbnail images have been successfully generated.

2.7 Global Products Attribute Overview

You can use this section to create and manage global product attributes that will appear every time you add a product. But, remember it will appear only when you assign the global product attribute on the Product (Insert) 18 or Product (Update) 26 page. To know more about creating and managing global product attributes, click on the links below.

Create New Global Products Attribute 52
Assign 55
Edit 55
Delete 56

2.7.1 Create New Global Products Attribute

You can use this option to create global product attributes that will appear every time you add a product. To **Create New Global Products Attributes**, follow the steps:

1. Click **Global Attributes**, as shown in the Figure 2-24-1 below.

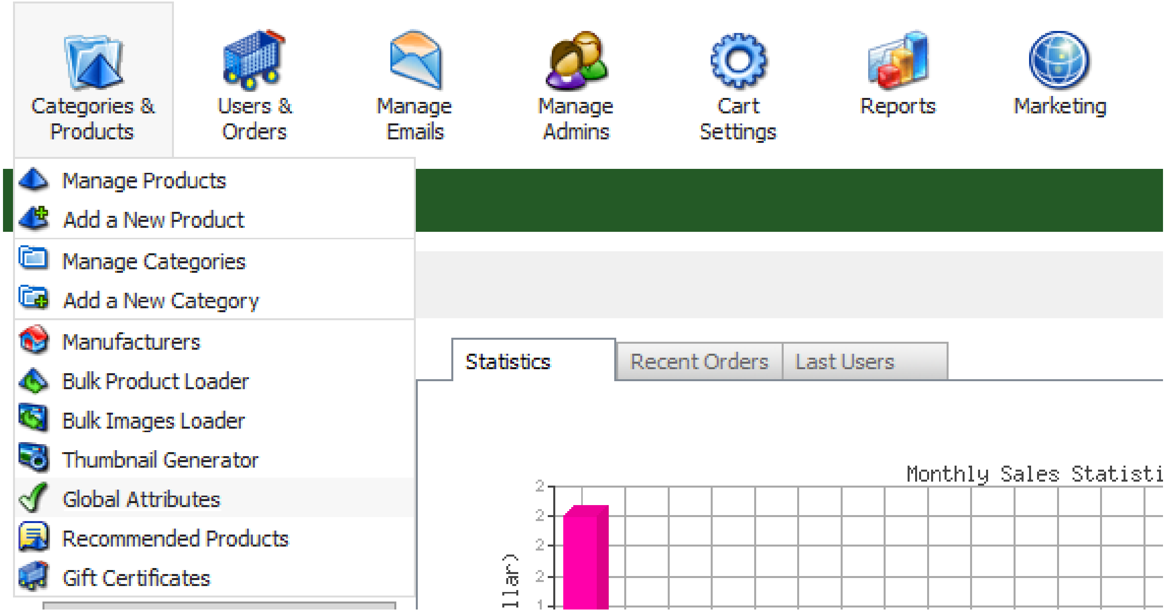


Figure 2-24-1: Global Attributes

The **Global Product Attributes** page will open, as shown in the Figure 2-24-2 below.

Note: You can also directly open the **Global Product Attributes** page, by clicking on the **Global Attributes** link in the Admin Area Home page 8.

2. Click on the **Click to Create a New Attribute** link.

Figure 2-24-2: Global Product Attributes

The **Global Product Attributes (insert)** page will open.

3. Select the **product categories** for the attribute, where it will be applied.

Note: You can select **multiple product categories** by holding the **Ctrl** button on your keyboard and then clicking on the **categories**.

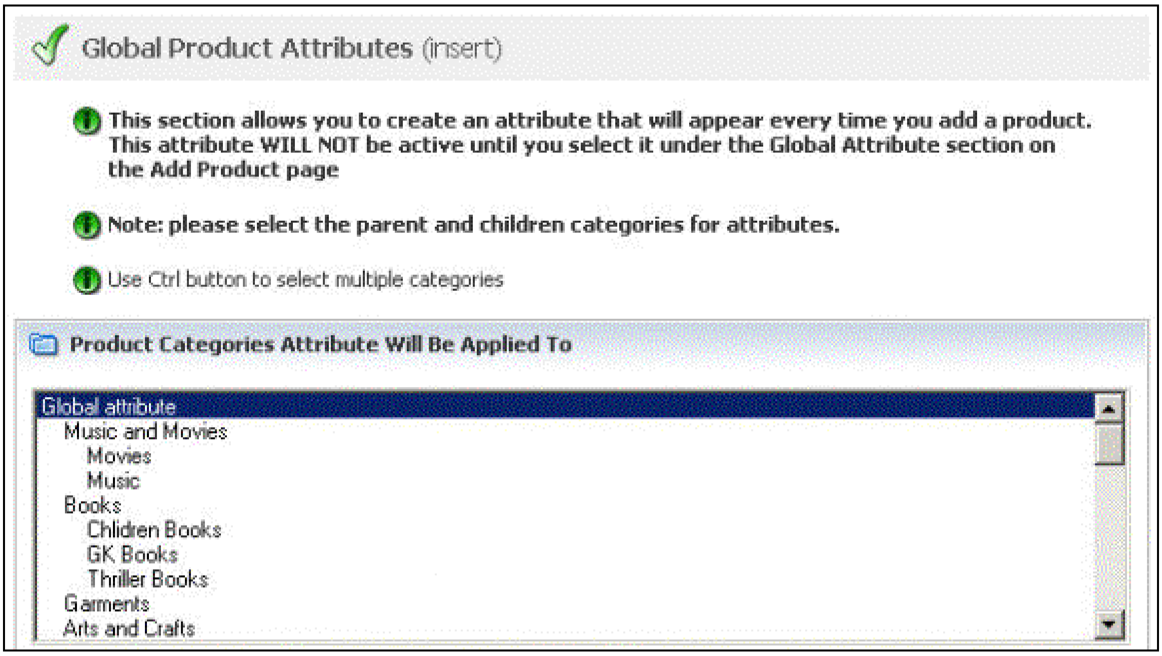


Figure 2-24-3: Global Product Attributes (insert)

4. **Global Product Attributes Settings:** Enter the following information:
   a. **Attribute Name:** Enter the name for the attribute.
   b. **Input Caption:** Type the text that will define the attribute on the Add Product Page.
   c. **Default Priority (used for sorting):** Select the default priority for the attribute from the drop down menu. You can select this on a scale of 1 to 10, where 1 is given the highest priority. The attribute with the highest priority will appear first.
   d. **Is Attribute Active For Products:** Select **Yes** from the drop down menu to activate the attribute on the Add Product Page. If **No** is selected, the attribute will not appear on the Add Product Page. By default, **No** is selected from the drop-down menu.
   e. **Choose an Attribute Type:** Select **Drop-Down Box** or **Text Input** attribute type from the drop down menu.

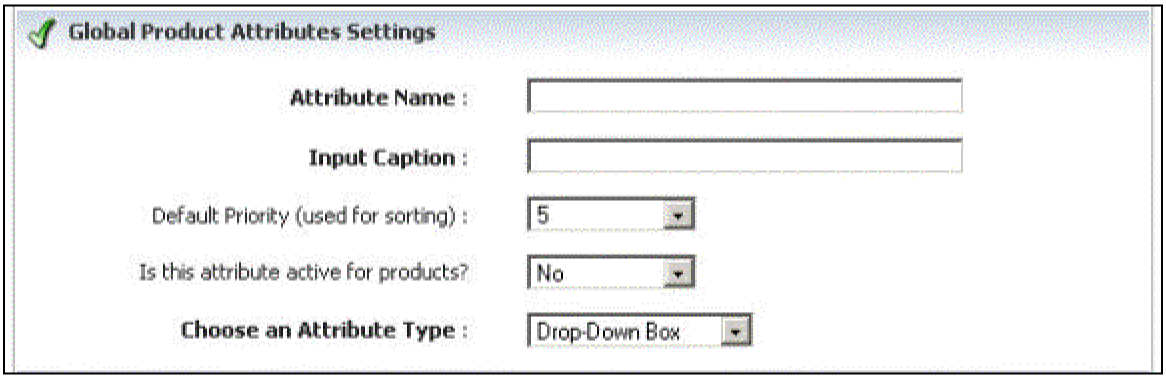


Figure 2-24-4: Global Product Attributes Settings

5. **Drop-Down Box Attribute Parameters:** If you select **Drop-Down Box** as **Attribute Type** then enter the following information:

a. **Options list (value per line):** Type the attributes that you want to appear for selection on the product page as drop down menu. Each option should be entered in a new line.

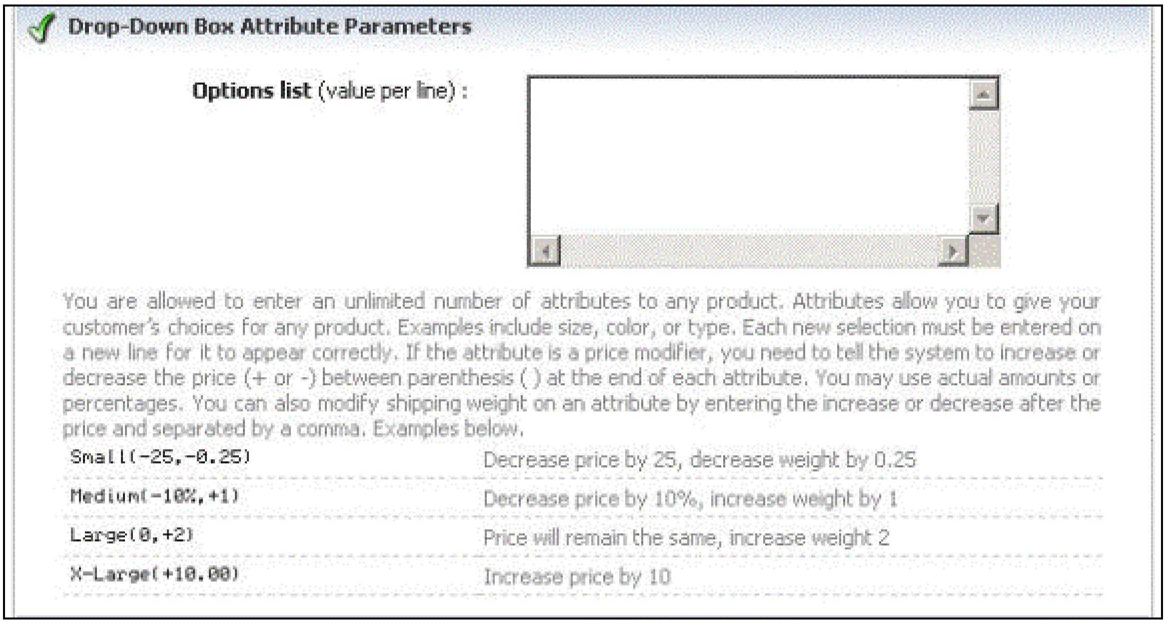


Figure 2-24-5: Drop-Down Box Attribute Parameters

6. **Text Input Attribute Parameters:** If you select **Text Input** as **Attribute Type**, then enter the **Text Length** under **Text Input Attribute Parameters**.

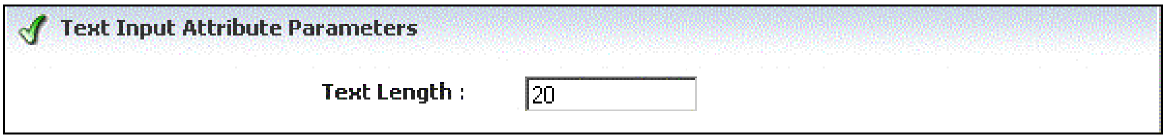


Figure 2-24-6: Text Input Attribute Parameters

7. **Choose Update Mode:** Select the **Just Save Attributes** radio button, if you want the attribute data to be saved into your database, but that will not affect the product attributes. On the other hand, select **Bulk Update** radio button, if you want the attribute to be updated and assigned with all products globally or in selected categories along with the attribute data.

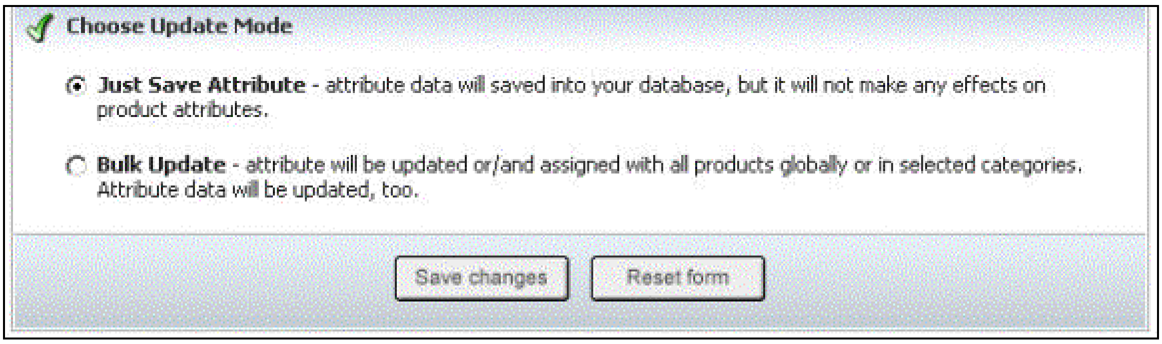


Figure 2-24-7: Choose Update Mode

8. If you want to reset the form, click on the **Reset form** button.

9. Click **Save changes** button to create global product attributes. You will get a confirmation message that the new attribute has been successfully created.

2.7.2 Assign Global Products Attribute

You can use this section to assign existing global attributes with a product, so that it would appear every time you add a product. To Assign Existing Global Attributes with a product, follow the steps:

1. Open the Product (Insert) 17 or Product (Update) 23 page.
2. In the Product (Insert) 18 or Product (Update) 26 page, click **Attributes** tab.
3. In the new page, scroll down to **Assign Global Attributes** and check the box next to the **existing global attributes** that you want to assign with the product, as shown in the Figure 2-25-1.

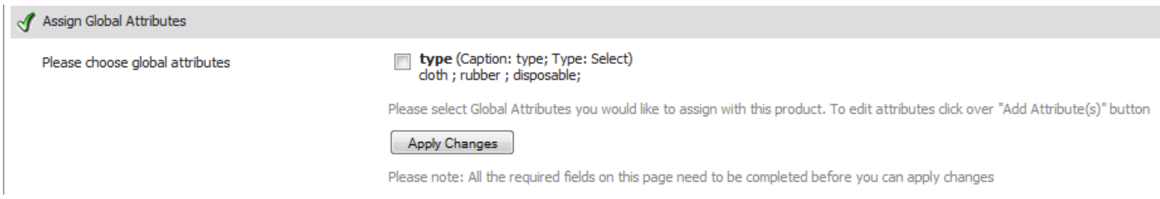


Figure 2-25-1: Assign Global Attributes

4. Click **Add Attribute(s)** button to assign the checked global attribute with the product.

2.7.3 Edit Existing Global Products Attribute

You can use this option to edit global products attribute. To **edit global products attribute**, follow the steps:

1. Open 52 the **Global Product Attributes** page with added global attributes, as shown in the Figure 2-26-1.

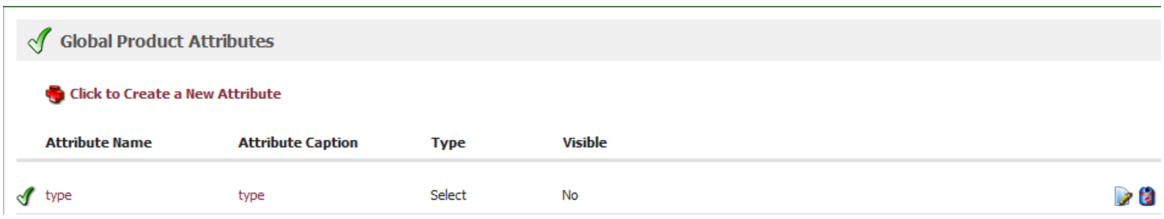


Figure 2-26-1: Global Product Attributes with added global attributes

2. Click **Edit Attribute** icon for the global product attribute you want to modify.
3. The **Global Products Attribute (update)** opens, where you can edit all the parameters.
4. If you want to reset the form, click on the **Reset form** button.
5. Click **Save changes** to update the information. You will get a confirmation

message that the attribute has been successfully updated.

2.7.4 Delete Existing Global Products Attribute

You can use this option to delete an existing Global Products Attribute. To **delete a Global Products Attribute**, follow the steps:

1. Open 52 the **Global Product Attributes** page with added global attributes.
2. Click **Delete Attribute** icon for the global product attribute you want to remove.

A pop up appears asking for confirmation, as shown in the Figure 2-27-1 below.

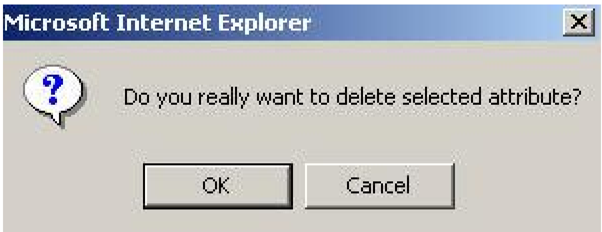


Figure 2-27-1: Delete Confirmation

3. Confirm deletion process, by clicking **OK** button. You will get a confirmation message that the attribute has been successfully removed.

2.8 Recommended Products Families Overview

Product Families give you the ability to add recommended products to your product pages. You can use this section to create the Product Families for Recommended Products. To know more about creating and managing product families, click on the links below.

Create a New Product Family 56
Edit 58
Delete 59

2.8.1 Create a New Product Family

To **Create a New Product Family**, follow the steps:

1. Click **Recommended Products**, as shown in the Figure 2-28-1 below.

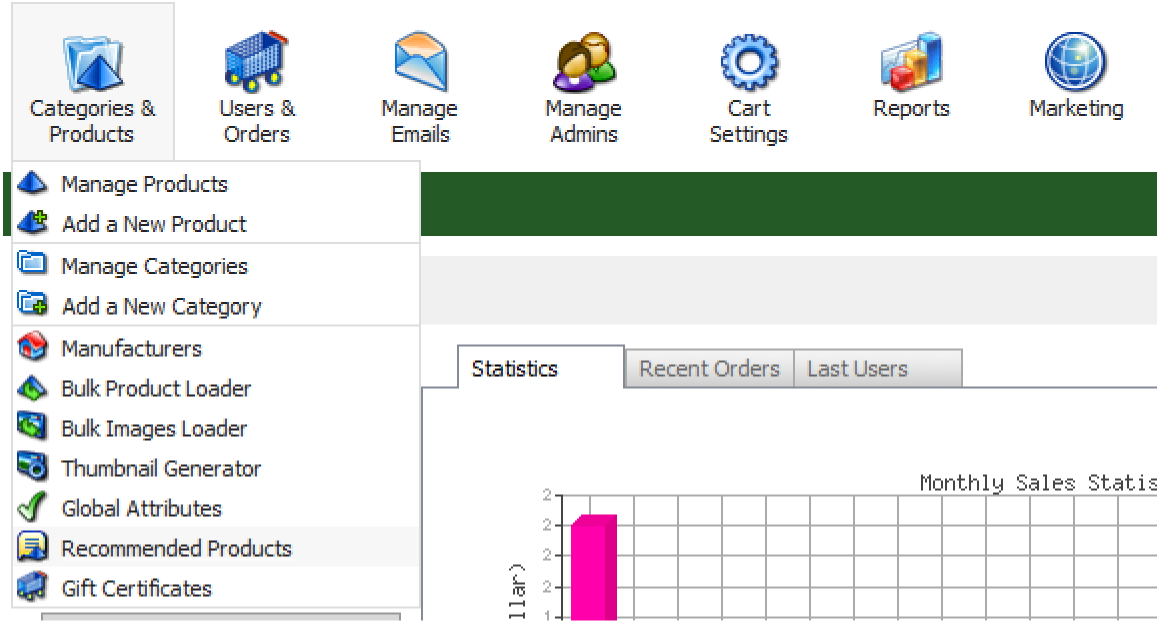


Figure 2-28-1: Recommended Products

The **Recommended Products Family** page will open, as shown in the Figure 2-28-2 below.

Note: You can also directly open the **Recommended Products Families** page, by clicking on the **Recommended Products** link in the Admin Area Home page 8.

You can also edit and delete a product family from the **Recommended Products Families** page. To know more about editing 58 and deleting 59 a product family, click on each of the links.

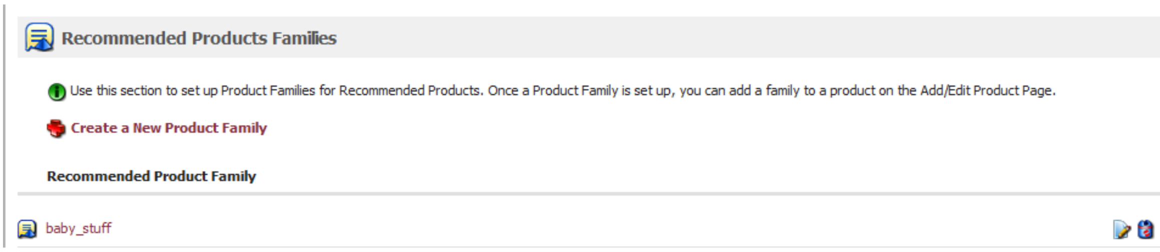


Figure 2-28-2: Recommended Products Families

2. Click on the **Create a New Product Family** link.

The **Recommended Products Family (Insert)** page will open, as shown in the Figure 2-28-3 58 below.

3. **Product Family Properties:** Enter the following information:
   a. **Name of Product Family:** Enter the name of the product family.
   b. **Products in this family:** Enter the **Product Name** or **ID**, of the products you would like to include within that family. The **Product Name** or **ID** will also help you to automatically search the product data from the database. Then, click on the **products**, to add them to the **Selected Products list**.

Note: You can also **delete products within a family** by selecting them and then, clicking the **Remove Selected** link below the list of **Selected Products**.

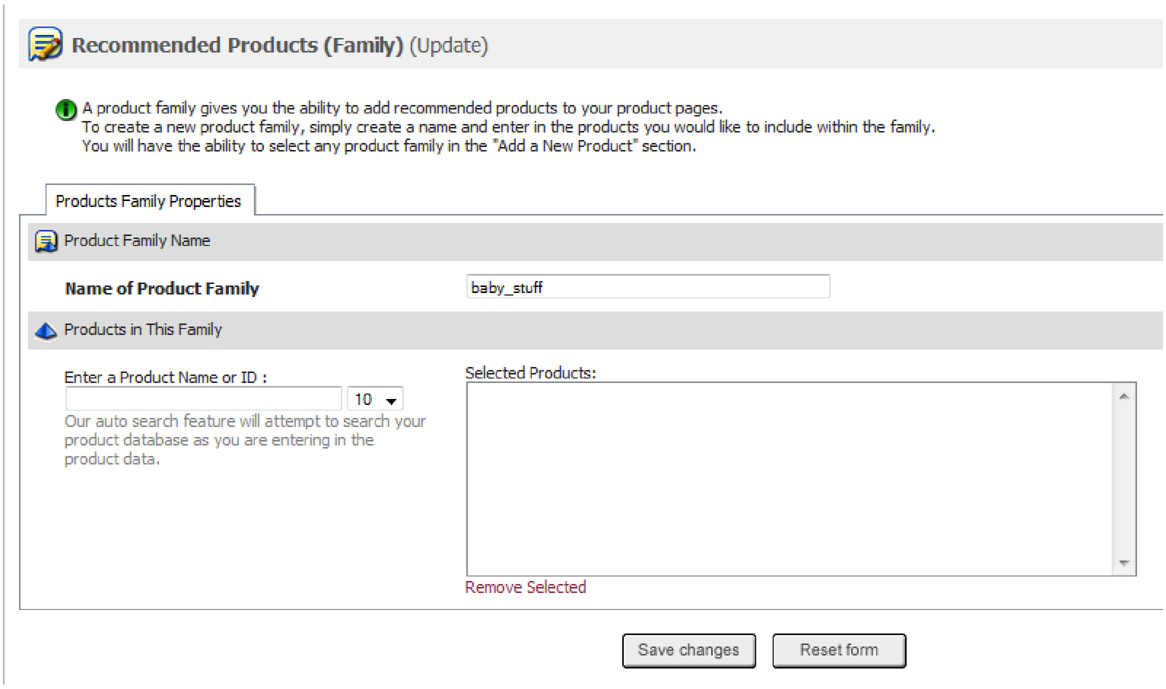


Figure 2-28-3: Recommended Products Family (Insert)

4. If you want to reset the form, click on the **Reset form** button.
5. Click **Save changes** button to save the information. You will get a confirmation message that the new products family has been successfully added.

2.8.2 Edit a Recommended Product Family

To **edit a recommended product family**, follow the steps:

1. Open 56 the **Recommended Products Families** page.
2. Click **Edit Products Family** icon for the recommended product family you want to modify.
3. The **Recommended Products Family (Update)** page opens, where you can modify all the parameters under **Product Family Properties**.

Note: You can also **delete products within a family** by selecting them and then, clicking the **Remove Selected** link below the list of **Selected Products**.

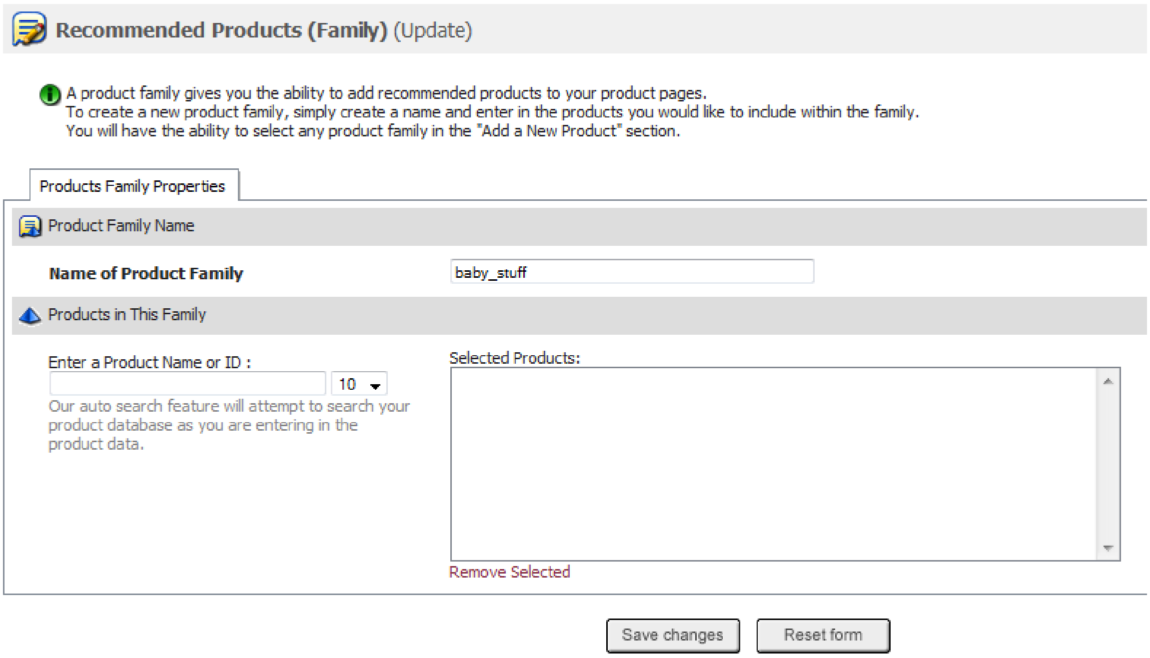


Figure 2-29-1: Recommended Products Family (Update)

4. If you want to reset the form, click on the **Reset form** button.
5. Click **Save changes** button to update the information. You will get a confirmation message that the products family has been successfully updated.

2.8.3 Delete a Recommended Product Family

To **delete a recommended product family**, follow the steps:

1. Open 56 the **Recommended Products Families** page.
2. Click **Delete Products Family** icon for the recommended product family you want to remove.

A pop up appears asking for confirmation, as shown in the Figure 2-30-1 below.

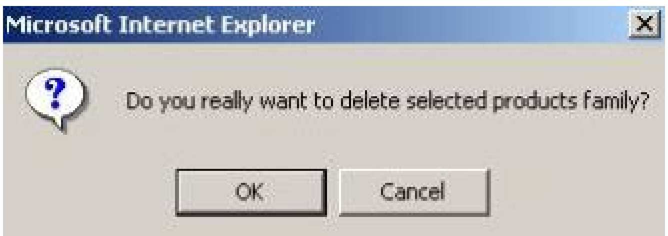


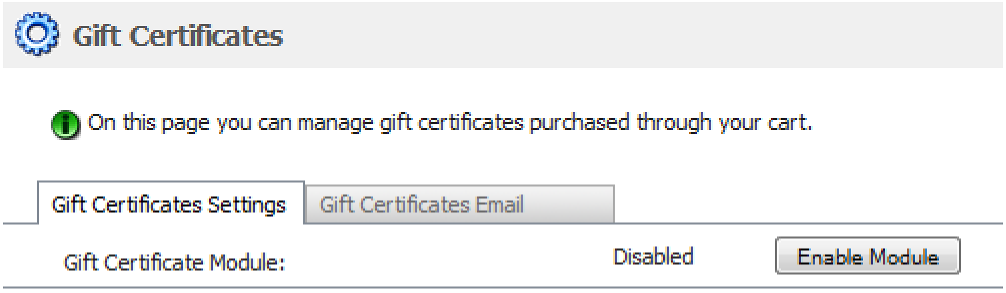
Figure 2-30-1: Delete Confirmation

3. Confirm deletion process, by clicking **OK** button. You will get a confirmation message that the products family has been successfully removed.

2.9 Gift Certificates

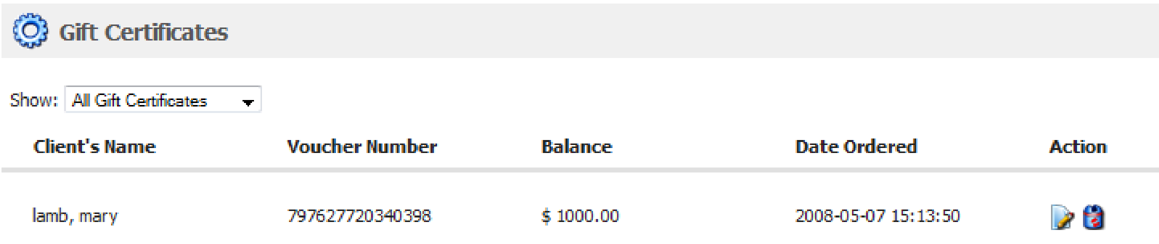
On this page you can manage gift certificates purchased through Springboard Promocart.

1. First you need to ensure you have the gift certificates 'Enabled' by clicking on the 'Enable Module' button as shown below.

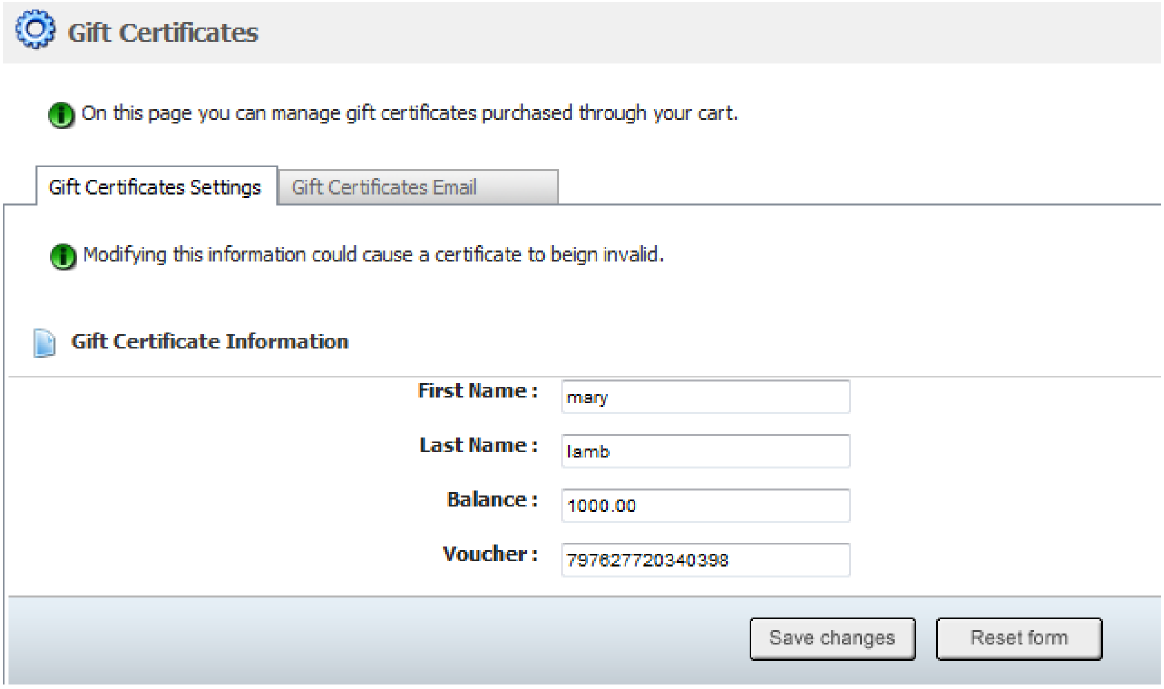


2. Click the '' to edit any certificate that has been purchased already.

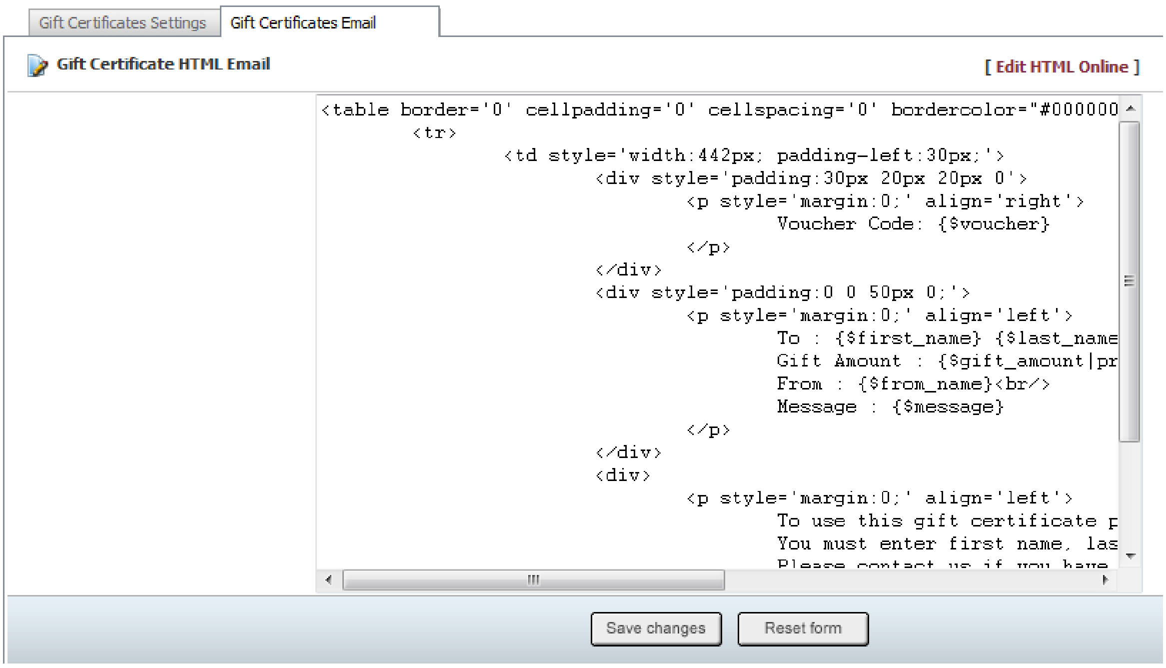
3. You can delete the existing certificates by clicking on the icon.



4. You would then be able to edit any of the fields as shown below.



5. In order to edit the emails that get sent when someone purchases a gift certificate click the 'Gift Certificates Email tab to edit the email that is sent to the recipient of the certificate as shown below.



6. Click on **[Edit HTML Online]** in order to edit HTML style pages.

7. Once done click on the 'Save Changes' button to save the changes you have made

here or click on the 'Reset Page' button to undo all your changes.

Top Level Intro

This page is printed before a new
top-level chapter starts

Part III

3 Users & Orders

3.1 Browse Users and Orders Overview

This section is used to search, view or edit users and orders for account / billing information as well as for browsing address book and orders for a user. You can also delete user profiles and orders. It has three sub sections:

Search Users 64
Search Orders 65
Export to Quick Books 67

3.1.1 Search Users

This section helps in viewing or editing user's account/billing information and browse user's address book. It also helps in removing user's profile.

To **search users**, follow the steps:

1. Click **Browse Users**, as shown in the Figure 3-1-1 below.

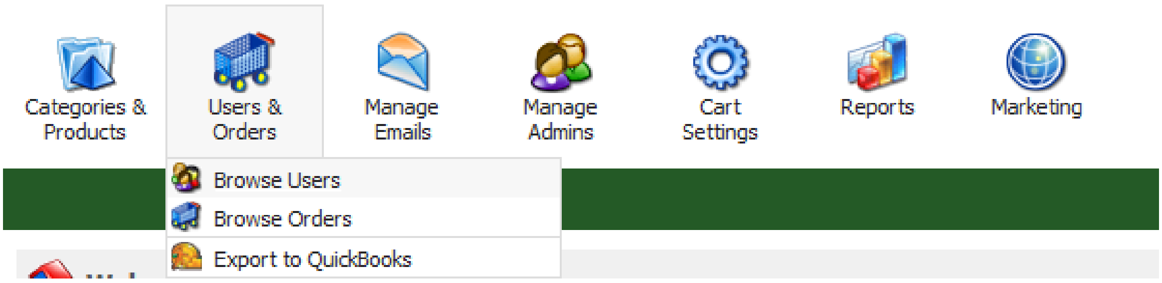


Figure 3-1-1: Browse Users

The **Users** page will open, as shown in the Figure 3-1-2 below.

Note: You can also directly open the **Users** page, by clicking on the **Browse Users** link in the Admin Area Home page 8.

2. Under **Search Users**, enter at least one-search criteria from the following: **Last Name**, **User Name**, **Company**, **Email Address** or **Phone Number**. You can enter multiple fields to get a more precise result.

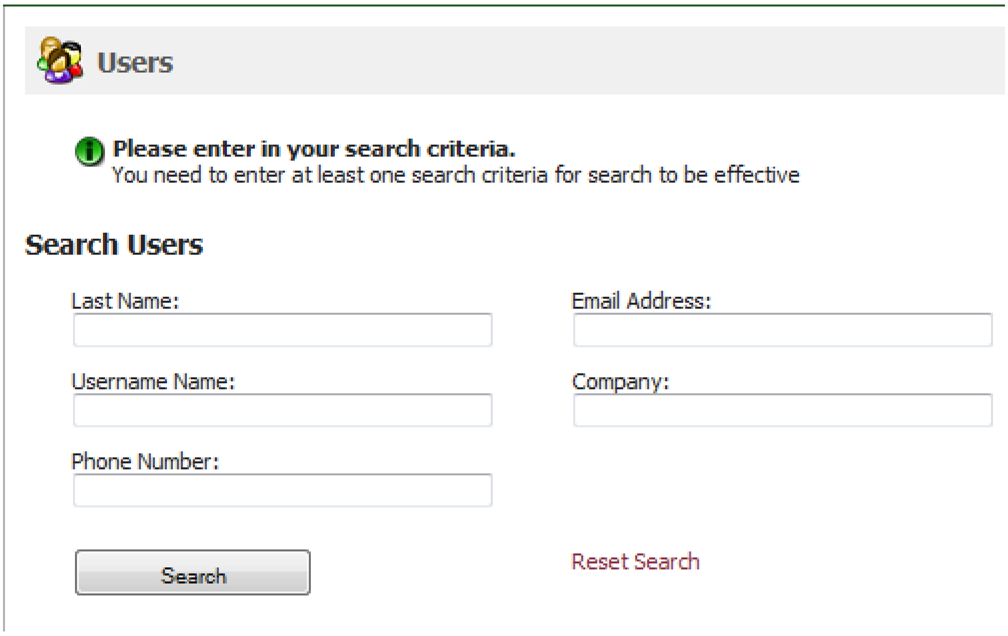


Figure 3-1-2: Users

3. After entering the criteria, click **Search users** button.

The **User Details** page opens with all the information about the selected user(s), as shown in the Figure 3-1-3 below.

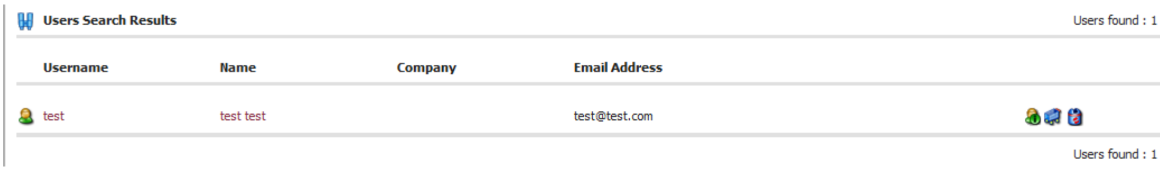


Figure 3-1-3: User Details Page

4. You can **view or edit account/billing information**, **browse all orders** and **delete user** from User Details 65 page by clicking on the respective icons.

3.1.2 Search Orders

This section helps in searching an order. You can edit/delete an order in the Springboard Promocart. You can also view the details of an order.

To **search an order**, follow the steps:

1. Click **Browse Orders**, as shown in the Figure 3-2-1 below.

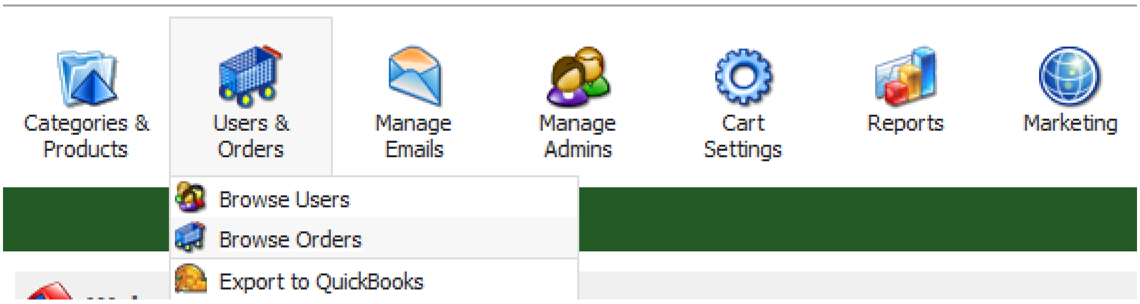


Figure 3-2-1: Browse Orders

The **Orders** page will open, as shown in the Figure 3-2-2 below.

Note: You can also directly open the **Orders** page, by clicking on the **Browse Orders** link in the Admin Area Home page 8.

2. Under **Search Orders**, enter at least one-search criteria from the following: **Order ID**, **Name**, **Order status**, **Order payment status** or **Order period** for search to be effective. You can enter multiples fields to get a more precise result.

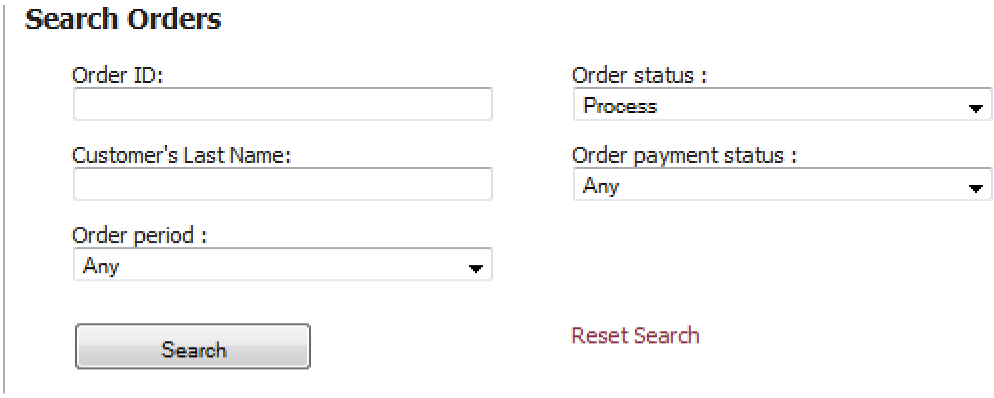


Figure 3-2-2: Orders

3. After entering the criteria, click **Search orders** button.

The **Order Details** page opens with all the information about the selected order(s), as shown in the Figure 3-2-3 below.

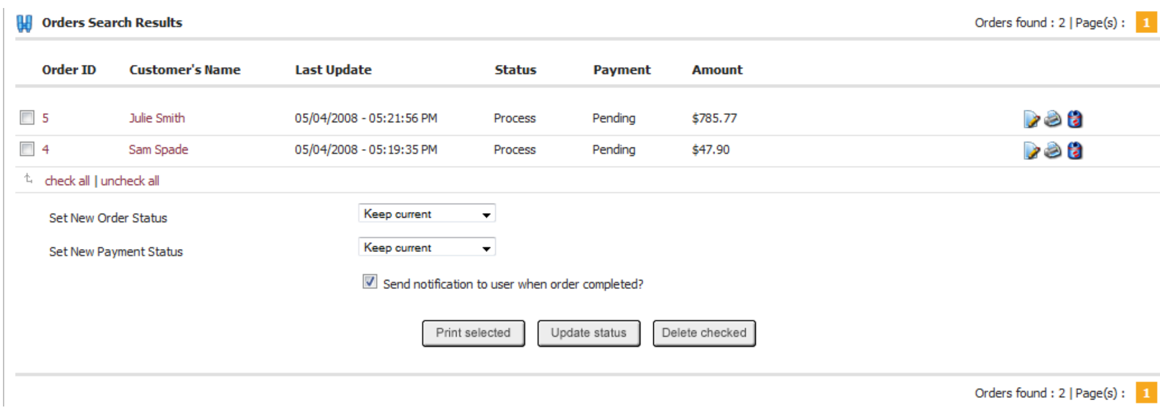


Figure 3-2-3: Order Details Page

4. You can **view or edit the selected order details**, **print invoice**, and **delete orders** from Order Details 66 page by clicking on the respective icons.

Note: You can also set new order and payment status for an order from Order Details 66 page by checking the order box and then selecting the new status from the drop-down menu. Click **Update status** button to save the changes. Similarly, you can **print** and **delete** an order by selecting an order and then clicking on the appropriate buttons at the bottom of the from Order Details 66 page.

3.1.3 Export to Quick Books

QuickBooks is designed for small business operators making the move from paper- or spreadsheet-based accounting; it helps to organize information quickly and easily. With QuickBooks, accounting and financial tasks are fast and easy. QuickBooks tracks all your financial information, from invoices and bills to inventory and purchase orders.

To go to **Export to Quick Books**, follow the steps:

1. Click **Export to Quick Books**, as shown in the Figure 3-3-1 below.

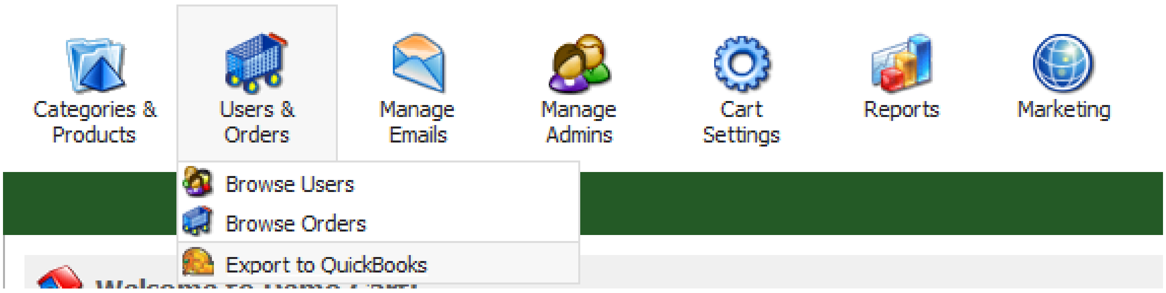


Figure 3-3-1: Export to Quick Books

The **Export to QuickBooks** page will open, as shown in the Figure 3-3-2 below.

Note: You can also directly open the **Export to QuickBooks** page, by clicking on the **Export to Quick Books** link in the Admin Area Home page 8.

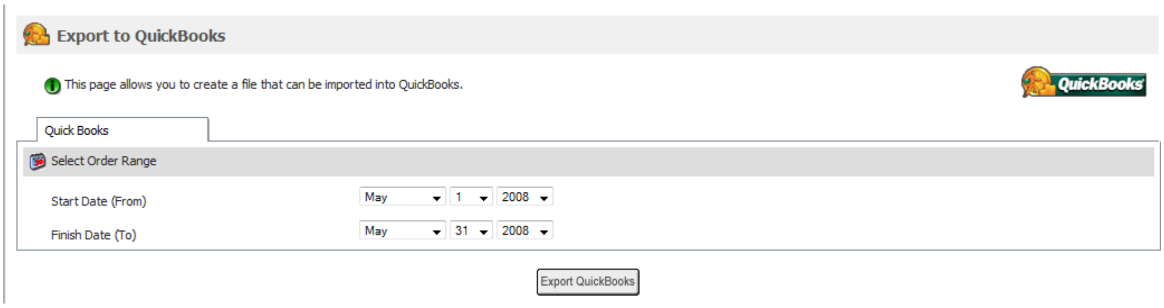


Figure 3-3-2: Export to Quick Books Page

2. Set the **Select Orders Date Range** from the drop down menu.
3. Click **Export QuickBooks** button.
4. The **File Download** window pops up.
5. Click **Save** button to open the **Save As** window, so you can choose where to save the file.
6. Find Where you have saved the file and open it in quickbooks.

Top Level Intro

This page is printed before a new
top-level chapter starts

Part IV

4 Manage Emails

This section is used to edit pre generated HTML and TEXT versions of your emails. You can also manage your newsletters and notify your customers about product updates. In addition, you can now even manage (edit and delete) the subscriber's emails and top and bottom email templates for HTML and Text Email. You can also remove bad and bounced email addresses from your email list through this section.

The following activities can be done with regards to an email:

4.1 Newsletter Email Wizard

This section helps you to edit pre generated HTML and TEXT versions of your newsletter.

To **edit pre generated HTML and TEXT versions**, follow the steps:

1. Click **Newsletter Email Wizard**, as shown in the Figure 4-1-1 below.

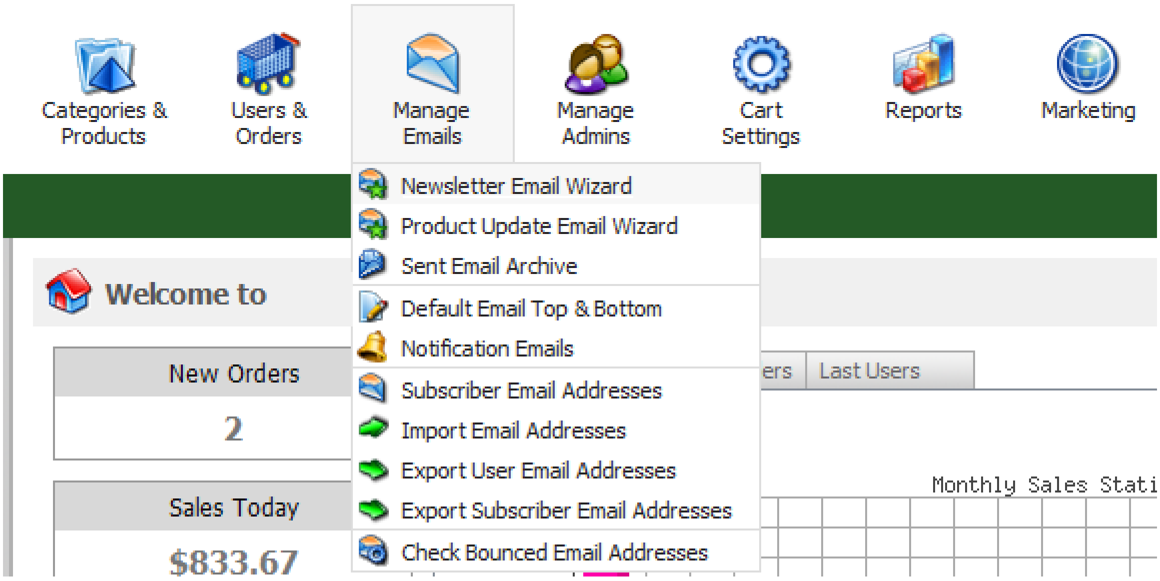


Figure 4-1-1: Newsletter Email Wizard

The **Newsletter Email Wizard (step 1 of 3)** page will open.

Note: You can also directly open the **Newsletter Email Wizard (step 1 of 3)** page, by clicking on the **Newsletter Email Wizard** link in the Admin Area Home page 8.

2. **Newsletter Email:** Enter the following information:
    a. **Subject:** Type the subject of the letter.
    b. **From Name:** Type the name of the Sender.
    c. **From Email:** Type the email address of the Sender.

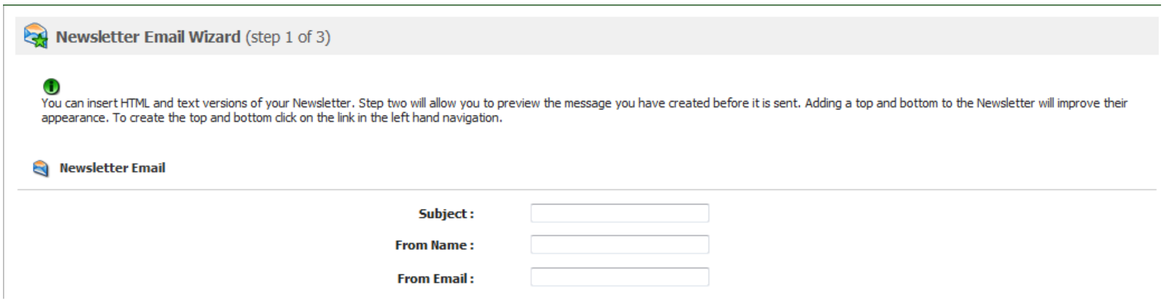


Figure 4-1-2: Newsletter Email

3. **Content for HTML Email:** You can **edit** the **HTML Email** content in plain text.

Figure 4-1-3: Content for HTML Email

4. Further, you can create an eye-catching HTML Email content, by clicking **Edit HTML Online** in **Content for HTML Email**, as shown in the Figure 4-1-4 below.

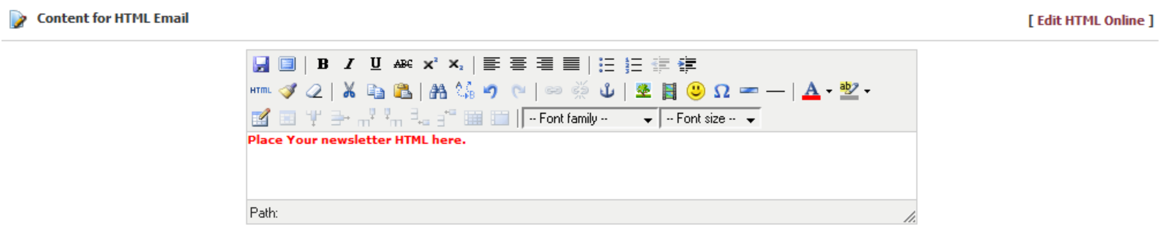


Figure 4-1-4: Online HTML Editor

5. **Content for Text Email:** You can **edit** the **Text Email** content in plain text.

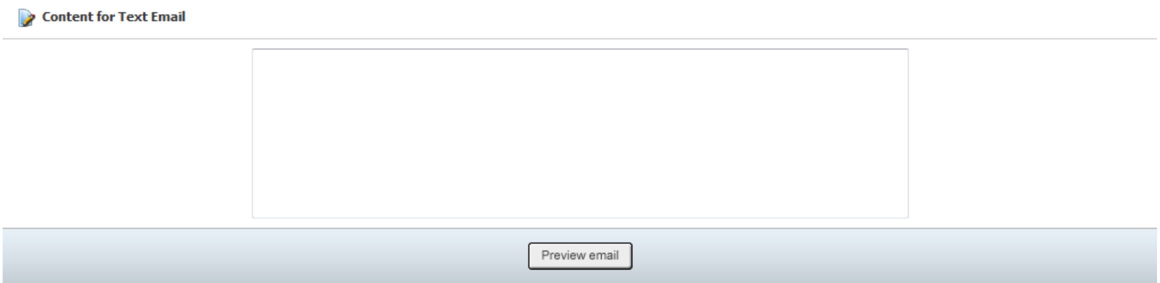


Figure 4-1-5: Content for Text Email

6. After **Editing the HTML and Text Email**, click **Preview Email** button.

The **Newsletter Email Wizard (step 2 of 3)** page will open, as shown in the Figure 4-1-7 73 below.

Note: In **Newsletter Email Wizard (step 2 of 3)** page, you can preview both the HTML and TEXT versions of your newsletter. Adding a top and bottom to these emails will improve their appearance.

7. To add a top and bottom, click **Emails Top & Bottom** in the left navigation, as shown in the Figure 4-1-6 below.

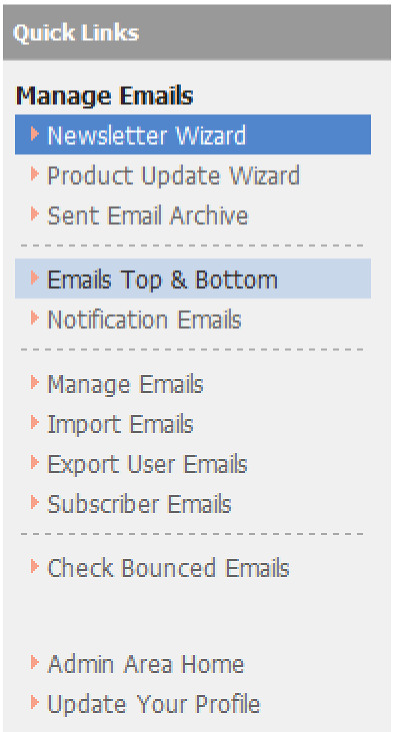


Figure 4-1-6: Emails Top & Bottom

Note: Clicking **Emails Top & Bottom** in the left navigation will open the **Top and Bottom Email Templates** page. Enter **HTML and Text Email Top & Bottom** and then click **Save changes** button to update the information. To know more about **Emails Top & Bottom**, go to Default Email Top and Bottom 81 section.

8. In the **Newsletter Email Wizard (step 2 of 3)** page, you can also request for a **Test Email**, by filling the **Test Email Address** box and then clicking on the **Send test email** button.

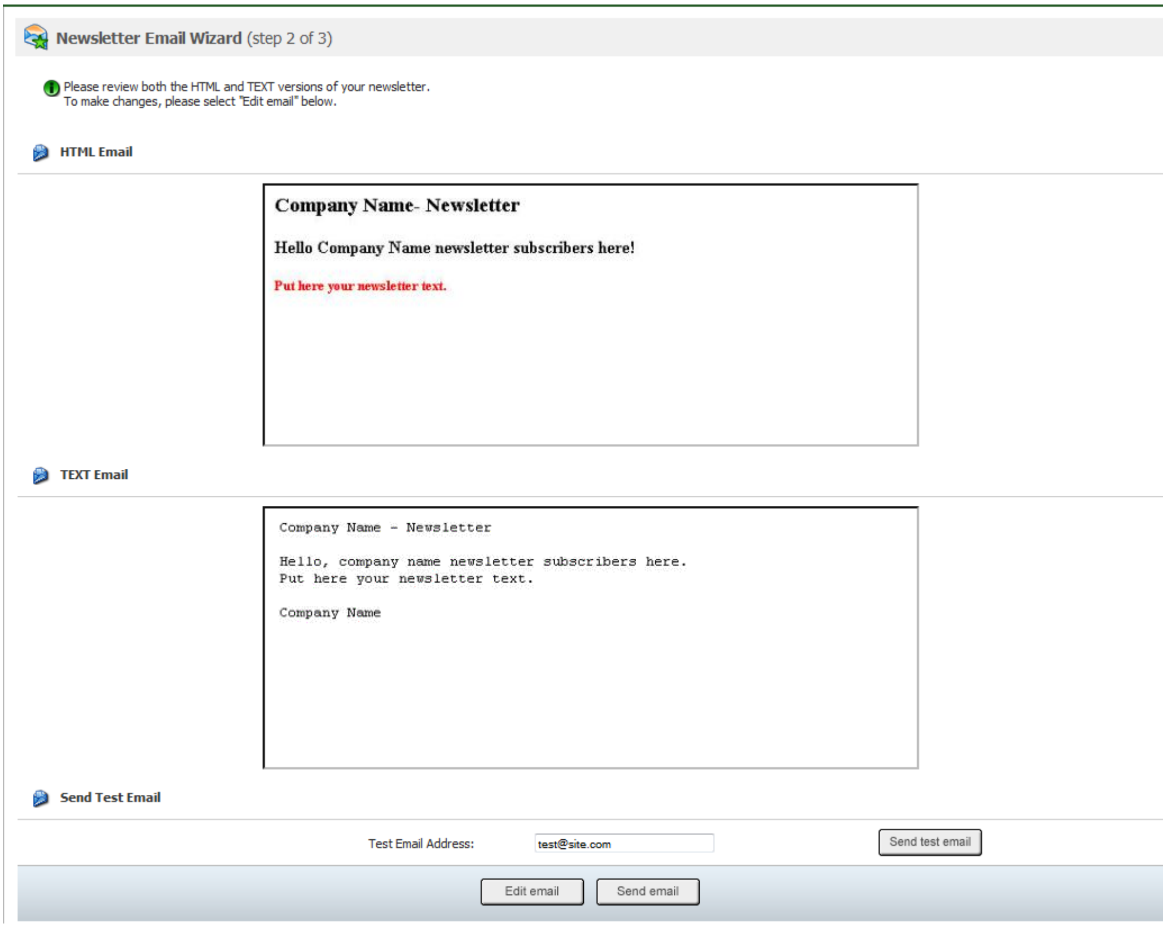


Figure 4-1-7: Newsletter Email Wizard (step 2 of 3)

9. If you still want to make changes, click on the **Edit email** button. You will then be taken back to the Newsletter Email Wizard (step 1 of 3) 71 page.
10. You can send the email immediately by clicking on the **Send email** button.

A pop up appears asking for confirmation, as shown in the Figure 4-1-8 below.

Figure 4-1-8: Newsletter email sending confirmation

11. Confirm sending newsletter email, by clicking **OK** button.

Note: To avoid duplicate sends, click **OK** button only once.

The **Newsletter Email Wizard (step 3 of 3)** page will open. You will get a confirmation message that the Newsletter Email has been successfully sent.

4.2 Product Updates Email Wizard

You can send to your customer's updates about your products using this feature.

For **Product Updates Email Wizard**, follow the steps:

1. Click **Product Updates Email Wizard**, as shown in the Figure 4-2-1 below.

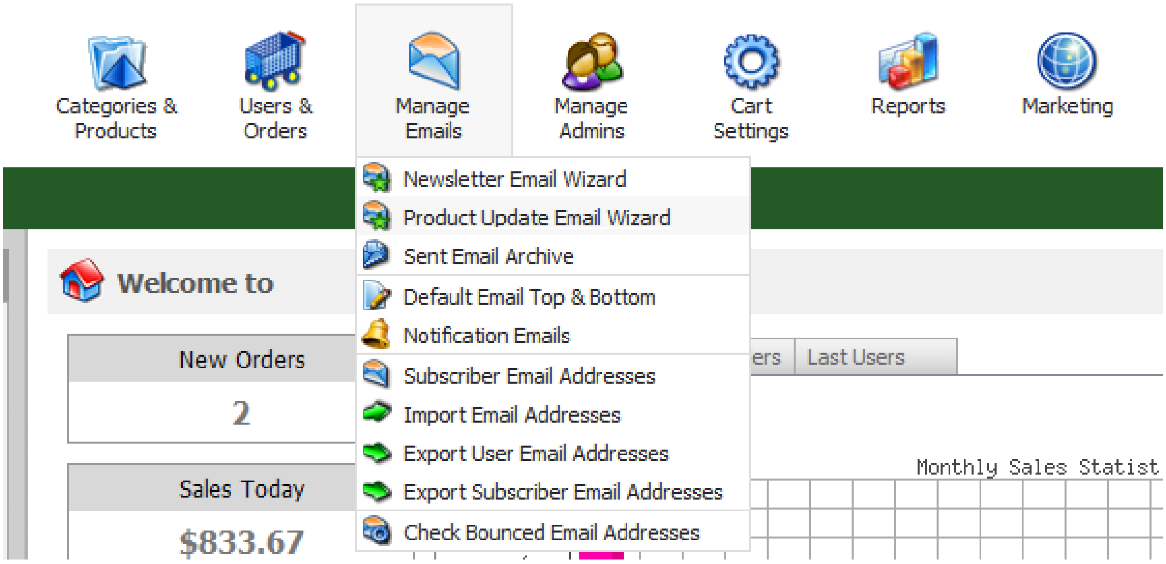


Figure 4-2-1: Product Email Wizard

The **Product Updates Email Wizard (step 1 of 4)** page will open, as shown in the Figure 4-2-2 75 below.

Note: You can also directly open the **Product Updates Email Wizard (step 1 of 4)** page, by clicking on the **Product Updates Email Wizard** link in the Admin Area Home page 8.

2. Set the **Select Product Updates Date Range** from the **From** and **To** drop down menu.
3. Select **Product Layout in the Email** from the **Choose the layout for the HTML email** drop down menu, as shown in the Figure 4-2-2 below.

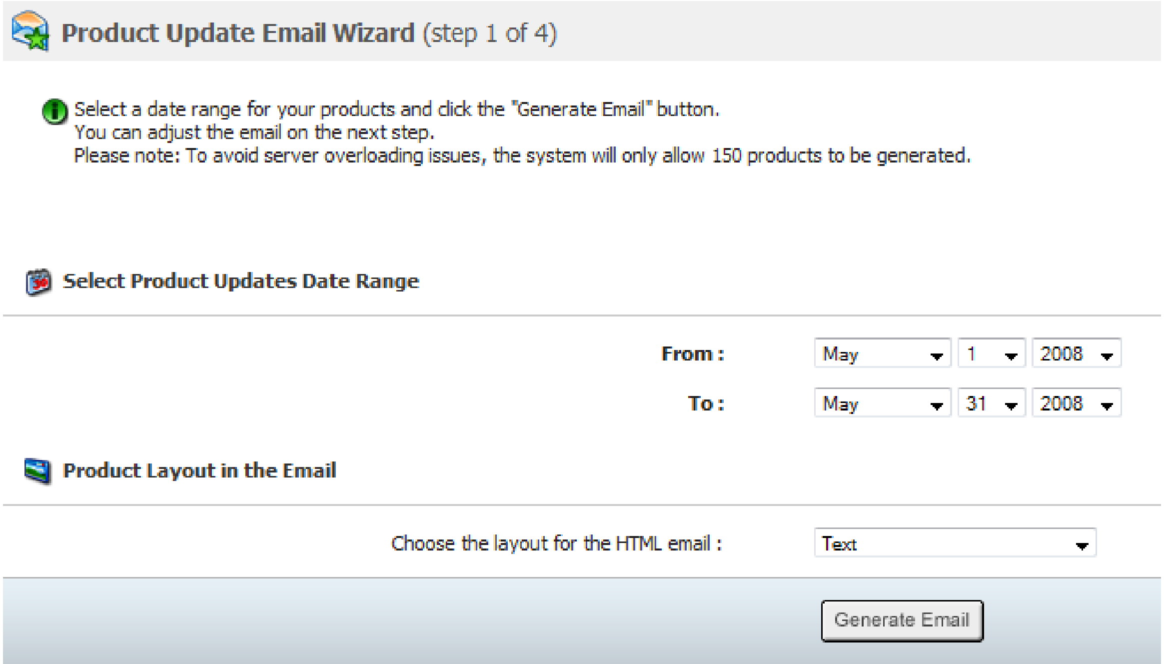


Figure 4-2-2: Product Updates Email Wizard (step 1 of 4)

4. Click **Generate Email** button.

The **Product Updates Email Wizard (step 2 of 4)** page will open. You may **edit** generated HTML and TEXT for product updates email.

5. **Email Properties:** Enter the following information:
   a. **Subject:** Type the subject of the Email, such as your company name.
   b. **From Name:** Type the name of the Sender.
   c. **From Email:** Type the email address of the Sender.

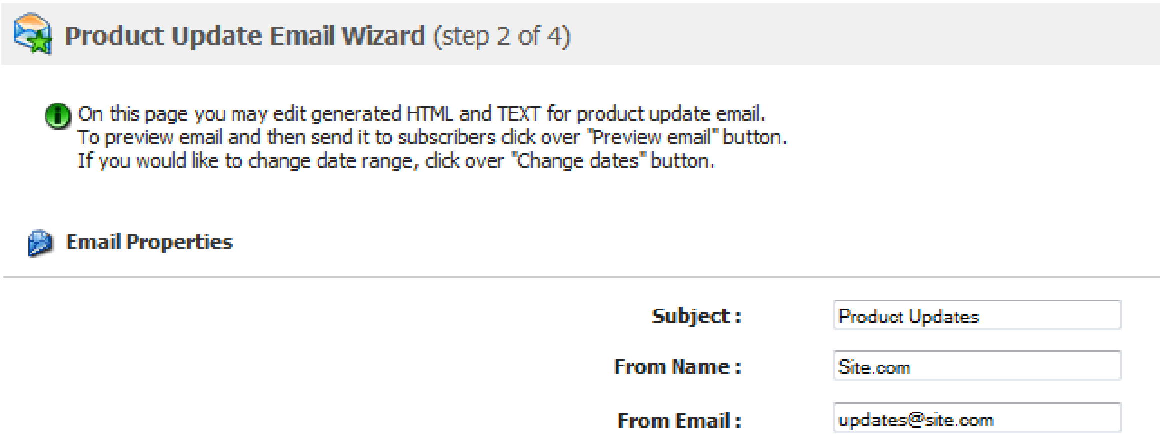


Figure 4-2-3: Email Properties

6. **HTML Email:** You can **edit** the **HTML Email** content in plain text.

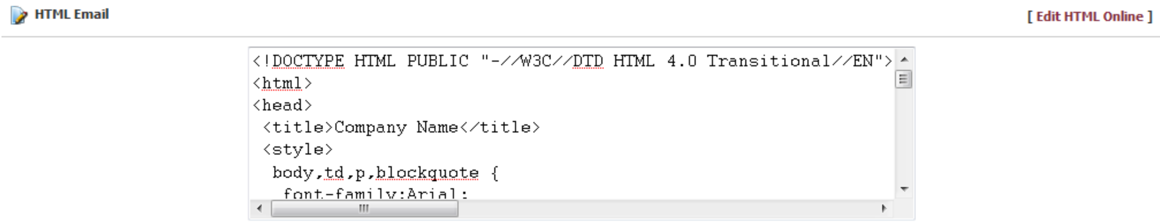


Figure 4-2-4: HTML Email

7. Further, you can create an eye-catching HTML Email content, by clicking on **Edit HTML Online** in **HTML Email**, as shown in the Figure 4-2-5 below.

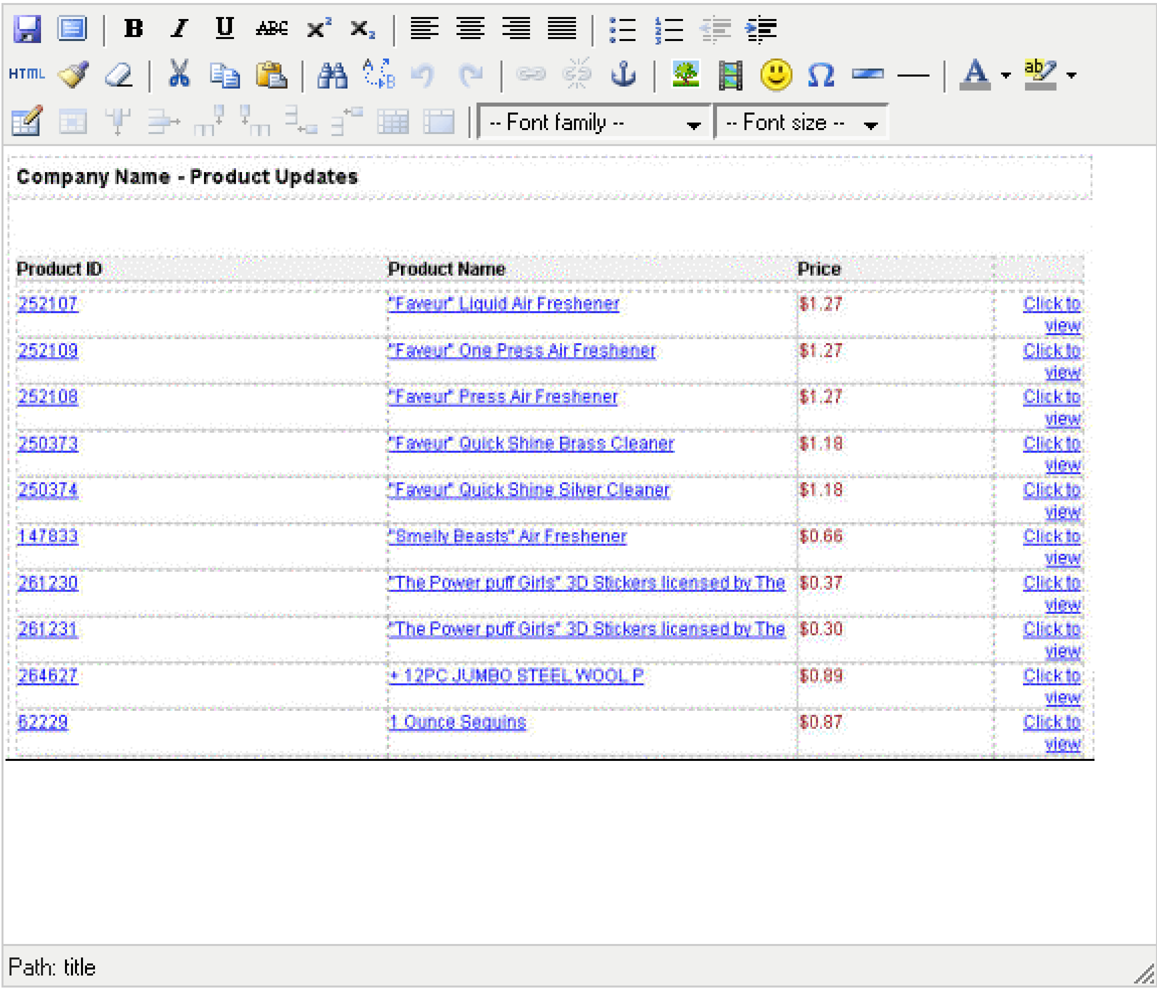


Figure 4-2-5: Online HTML Editor

8. **Text Email:** You can **edit** the **Text Email** content in plain text.

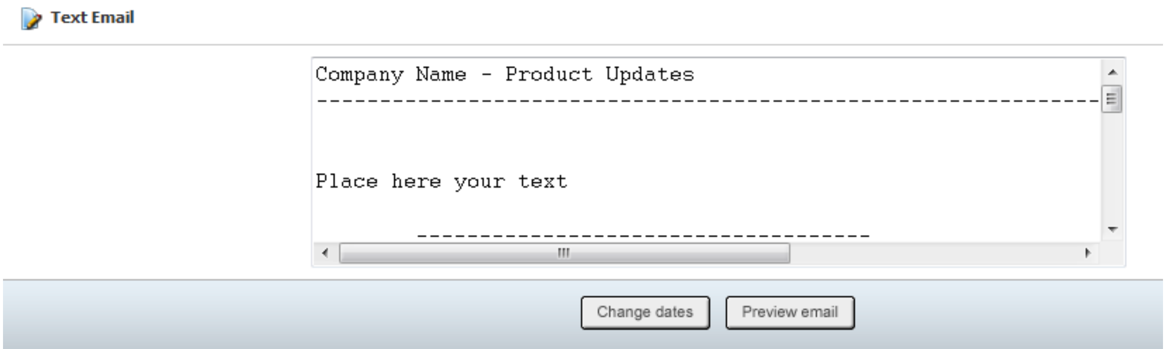


Figure 4-2-6: Text Email

9. Click **Change dates** button to change date range. You will be taken back to the Product Updates Email Wizard (step 1 of 4) 75 page.
10. To preview this email, click **Preview email** button.

The **Product Updates Email Wizard (step 3 of 4)** page will open, as shown in the Figure 4-2-7 78 below.

Note: In **Product Updates Email Wizard (step 3 of 4)** page, you can review both the HTML and TEXT modes of an email. It is suggested that you should review email, as it will be visible for subscribers in HTML and TEXT modes.
You can also request for a **Test Email**, by filling the **Test Email Address** box and clicking **Send test email** button in the **Product Updates Email Wizard (step 3 of 4)** page.

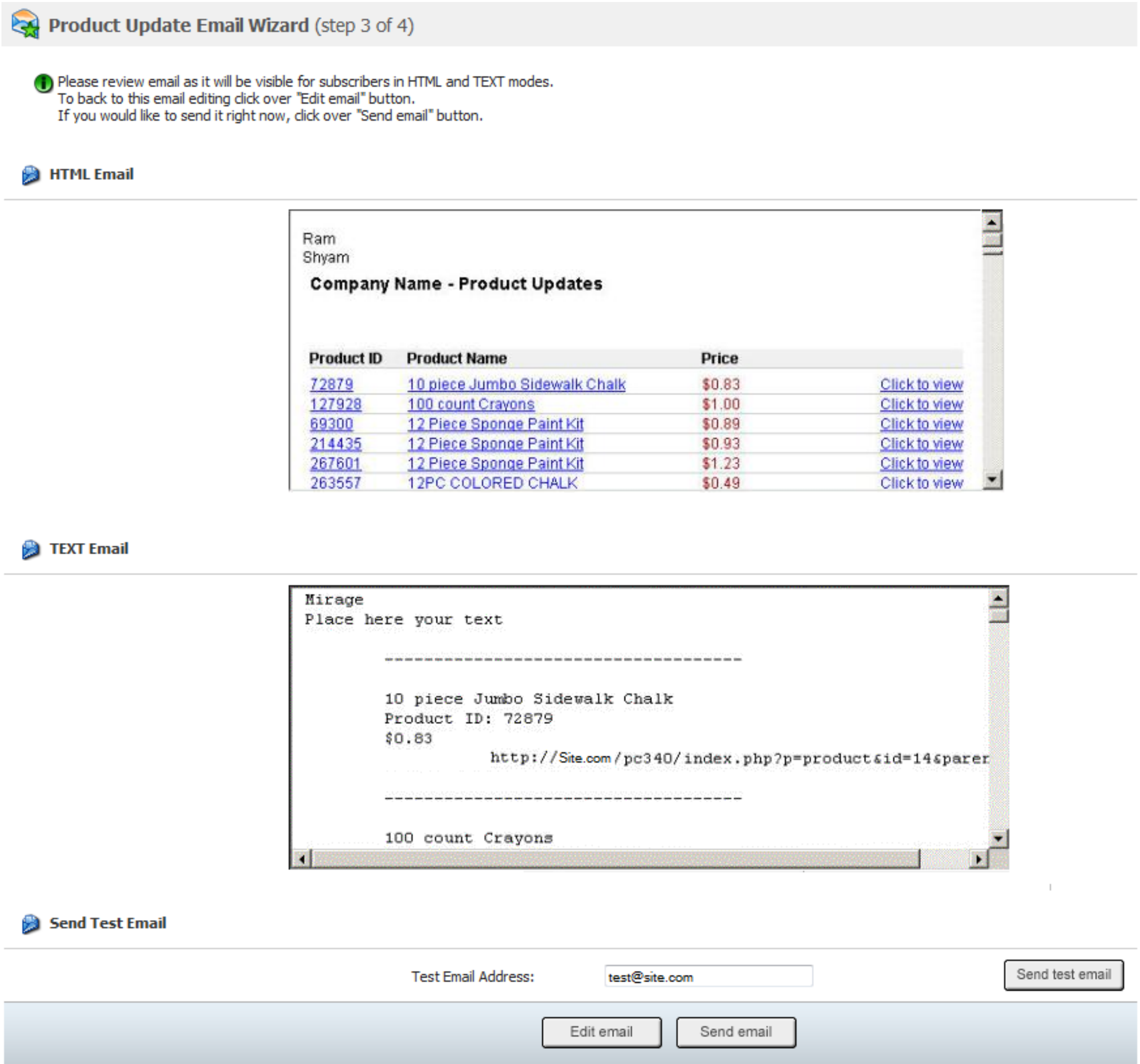


Figure 4-2-7: Product Updates Email Wizard (step 3 of 4)

11. If you still want to make changes, click on the **Edit email** button. You will be taken back to the **Product Updates Email Wizard (step 2 of 4)** page.
12. You can send the product updates email immediately by clicking on the **Send email** button.

A pop up appears asking for confirmation, as shown in the Figure 4-2-8 below.

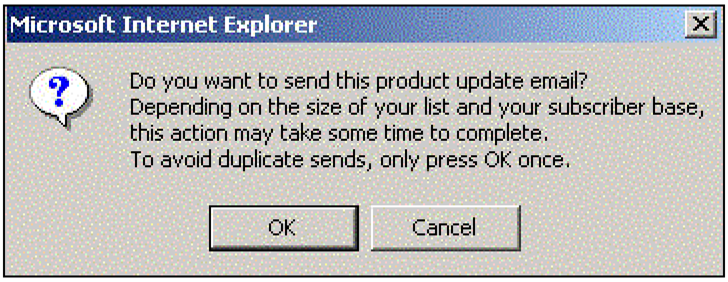


Figure 4-2-8: Email sending confirmation

13. Confirm sending product updates email, by clicking **OK** button.

Note: To avoid duplicate sends, click **OK** button only once.

The **Product Updates Email Wizard (step 4 of 4)** page will open. You will get a confirmation message that the Product Updates Email has been successfully sent.

4.3 Email Archive

This section is used to preview and remove emails that exist in your archive.

For **previewing and removing emails from archive**, follow the steps:

1. Click **Sent Emails Archive**, as shown in the Figure 4-3-1 below.

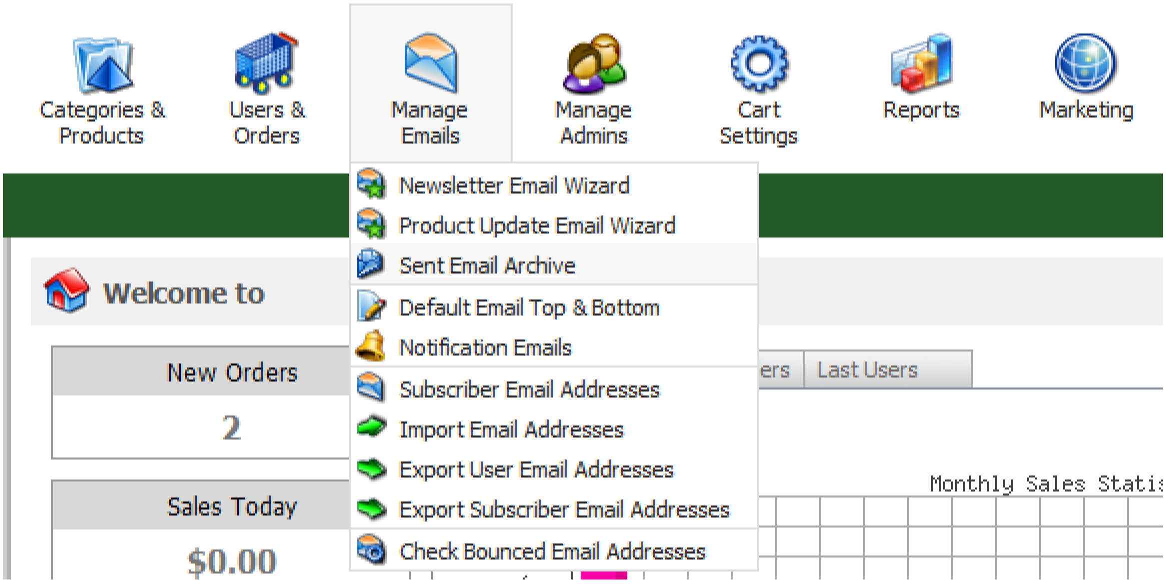


Figure 4-3-1: Sent Emails Archive

2. The **Emails Archive** page will open, as shown in the Figure 4-3-2 below.

Note: You can also directly open the **Emails Archive** page, by clicking on the **Sent Emails Archive** link in the Admin Area Home page 8.

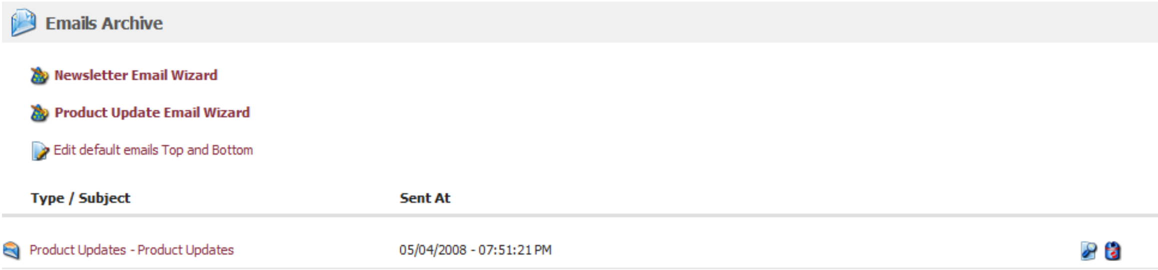


Figure 4-3-2: Emails Archive

Note: Click **Newsletter Email Wizard** link on the top of the **Emails Archive** page to open Newsletter Email Wizard (step 1 of 3) 71 page.

Click **Product Updates Email Wizard** link on the top of the **Emails Archive** page to open Product Updates Email Wizard (step 1 of 4) 75 page.

Click **Edit default emails Top and Bottom** link on the top of the **Emails Archive** page to open **Top and Bottom Email Templates** page. To know more about this page, go to Default Email Top and Bottom 81 section.

3. Click **Preview Email** icon to preview the email. The **Archived Email Preview** page will open, as shown in the Figure 4-3-3 below.

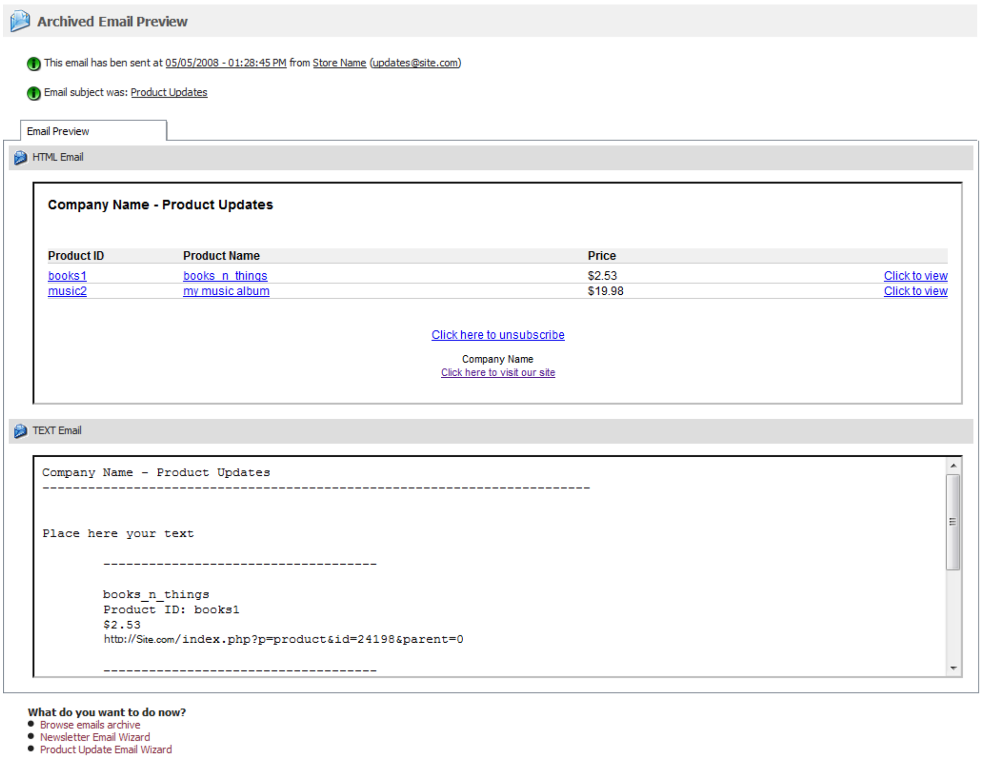


Figure 4-3-3: Archived Email Preview

Note: You can also **delete emails** that exist in your archive from the Emails Archive 80 page. Click **Remove Email From Archive** icon for the email you want to delete. A pop up appears asking for confirmation, as shown in the Figure 4-3-4 below.

Figure 4-3-4: Delete Confirmation

4. Confirm deletion process, by clicking **OK** button.

4.4 Default Email Top and Bottom

In this section you can edit the top and bottom email templates for HTML and Text Email.

For **editing the top and bottom email templates for HTML and Text Email**, follow the steps:

1. Click **Default Email Top & Bottom**, as shown in the Figure 4-4-1 below.

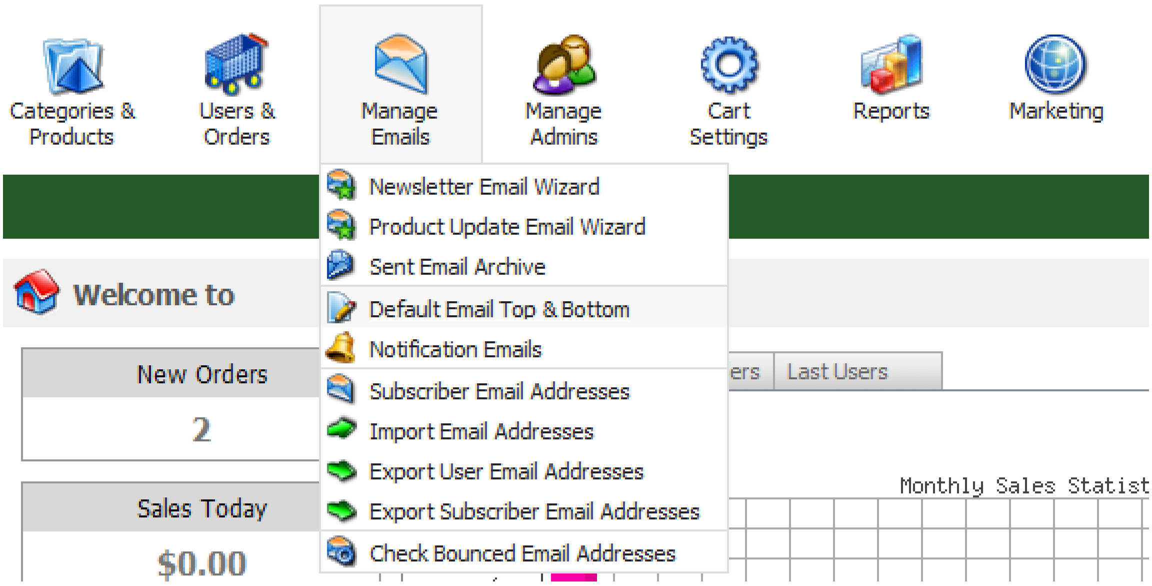


Figure 4-4-1: Default Emails Top & Bottom

The **Top and Bottom Email Templates** page will open. Here you can edit the top and bottom email templates for HTML and Text Email.

Note: You can also directly open the **Top and Bottom Email Templates** page, by clicking on the **Default Email Top & Bottom** link in the Admin Area Home page 8.

2. **Top and Bottom for HTML Email:** You can **edit** the top and bottom for **HTML Email** by clicking on the respective box.

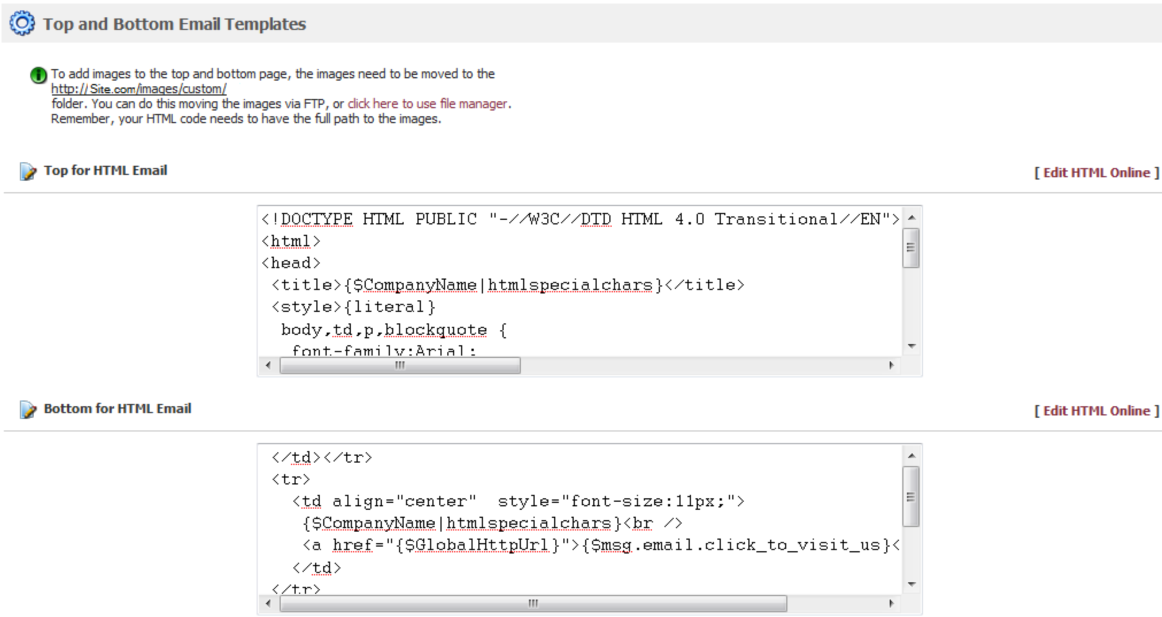


Figure 4-4-2: Top and Bottom for HTML Email

3. Further, you can create an eye-catching top and bottom for HTML Email, by clicking **Edit HTML Online** in **Top and Bottom for HTML Email**, as shown in the Figure 4-4-3 below.

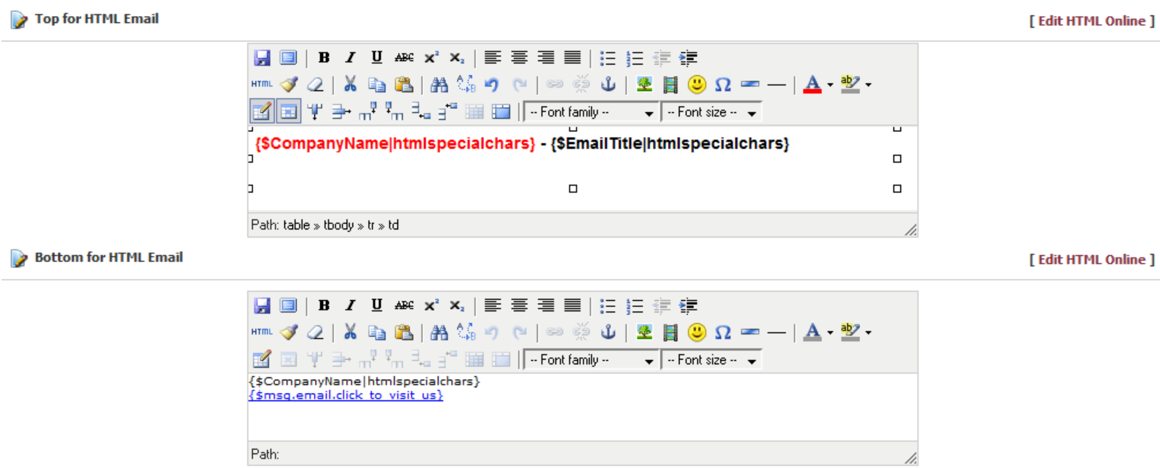


Figure 4-4-3: Online HTML Editor in Top and Bottom for HTML Email

4. **Top and Bottom for Text Email:** You can **edit** the top and bottom for **Text Email** by clicking on the respective box.

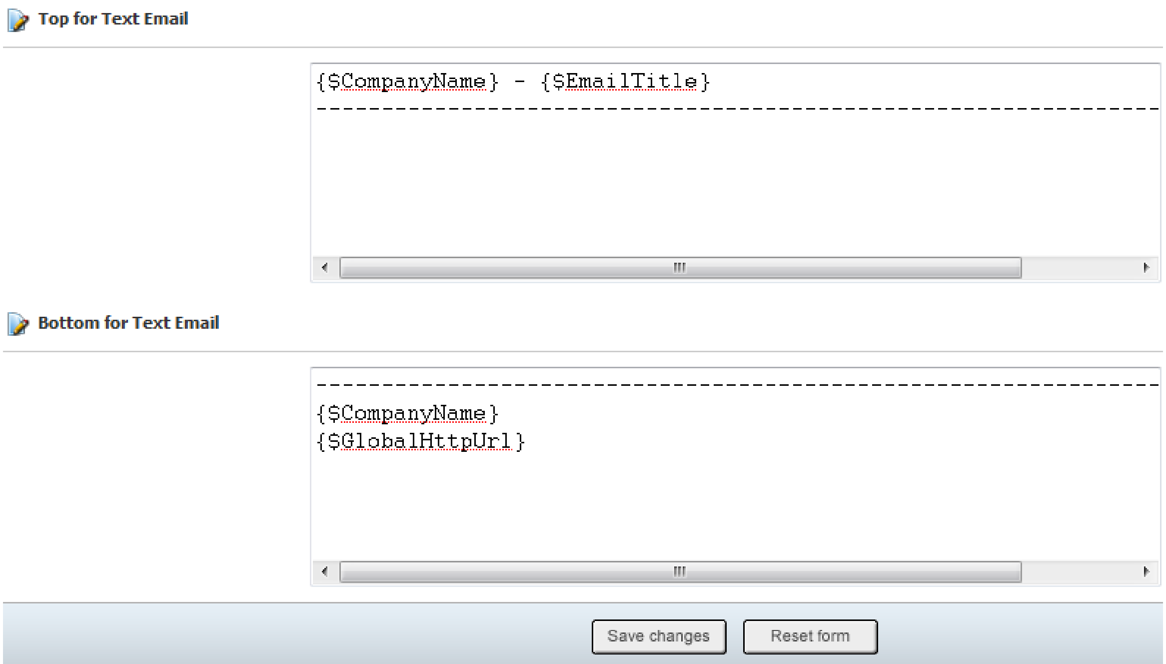


Figure 4-4-4: Top and Bottom for Text Email

5. If you want to cancel or start again, click on **Reset form** button.
6. Click on **Save changes** button to **edit the Top and Bottom Email Templates.** You can view the confirmation message on the top of the **Top and Bottom Email Templates** page, as shown in the Figure 4-4-5 below.

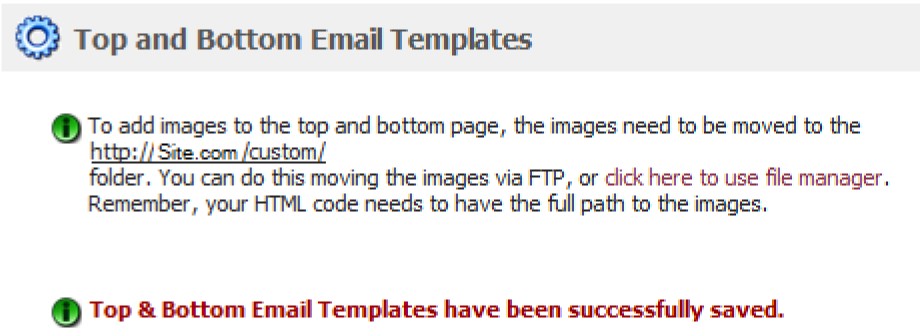


Figure 4-4-5: Saved Confirmation

4.5 Notification Emails

This section is used for editing email templates in notification email type.

For **Editing Email Template** in **Notification Email Type**, follow the steps:

1. Click **Notification Emails**, as shown in the Figure 4-5-1 below.

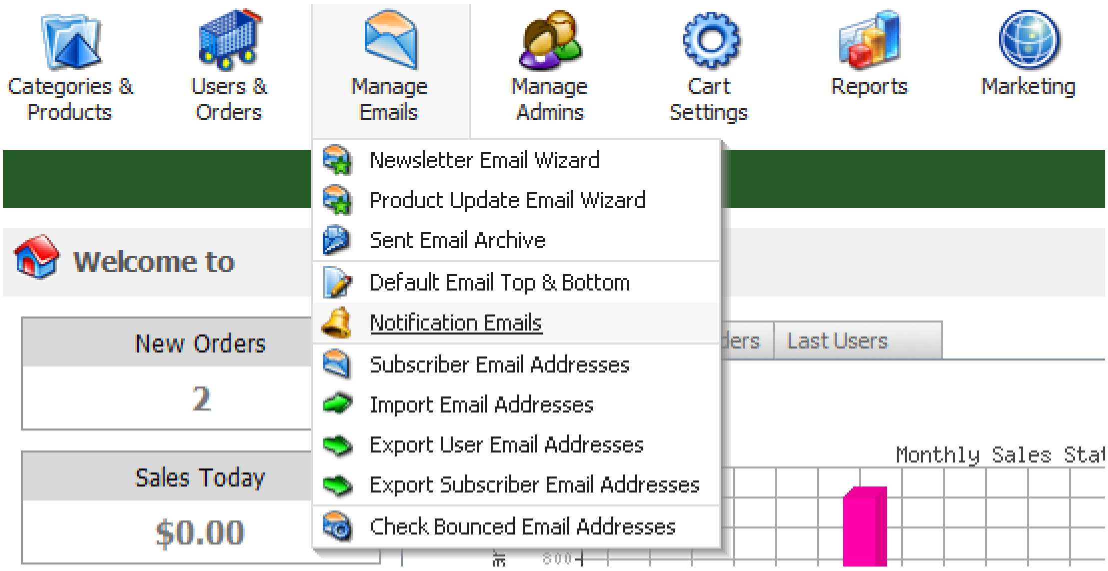


Figure 4-5-1: Notification Emails

2. The **Notification Emails** page will open, as shown in the Figure 4-5-2 below.

Note: You can also directly open the **Notification Emails** page, by clicking on the **Notification Emails** link in the Admin Area Home page 8.

Click **Edit default emails Top and Bottom** link on the top of the **Notification Emails** page to open **Top and Bottom Email Templates** page. To know more about this page, go to Default Email Top and Bottom 81 section.

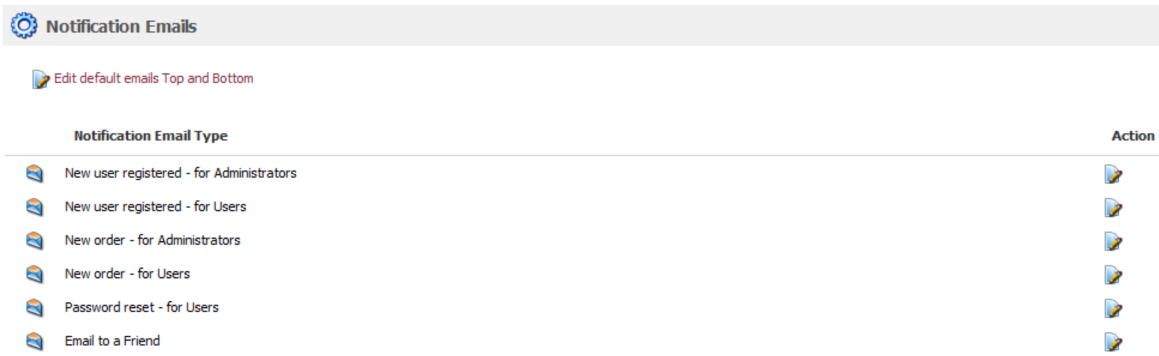


Figure 4-5-2: Notification Email Type

3. Click **Edit Email Template** icon, for the Notification Email Type you want to modify.

The **Edit Email Notification** page for that email type will open, as shown in the Figure 4-5-3 85 below.

4. Click on the respective boxes (**HTML** and **TEXT**) to **edit** the template for that email type.

Note: Click **Edit Top and Bottom Email Templates** link on the top of the **Edit Email Notification** page to open **Top and Bottom Email Templates** page. To

know more about this page, go to Default Email Top and Bottom 81 section.

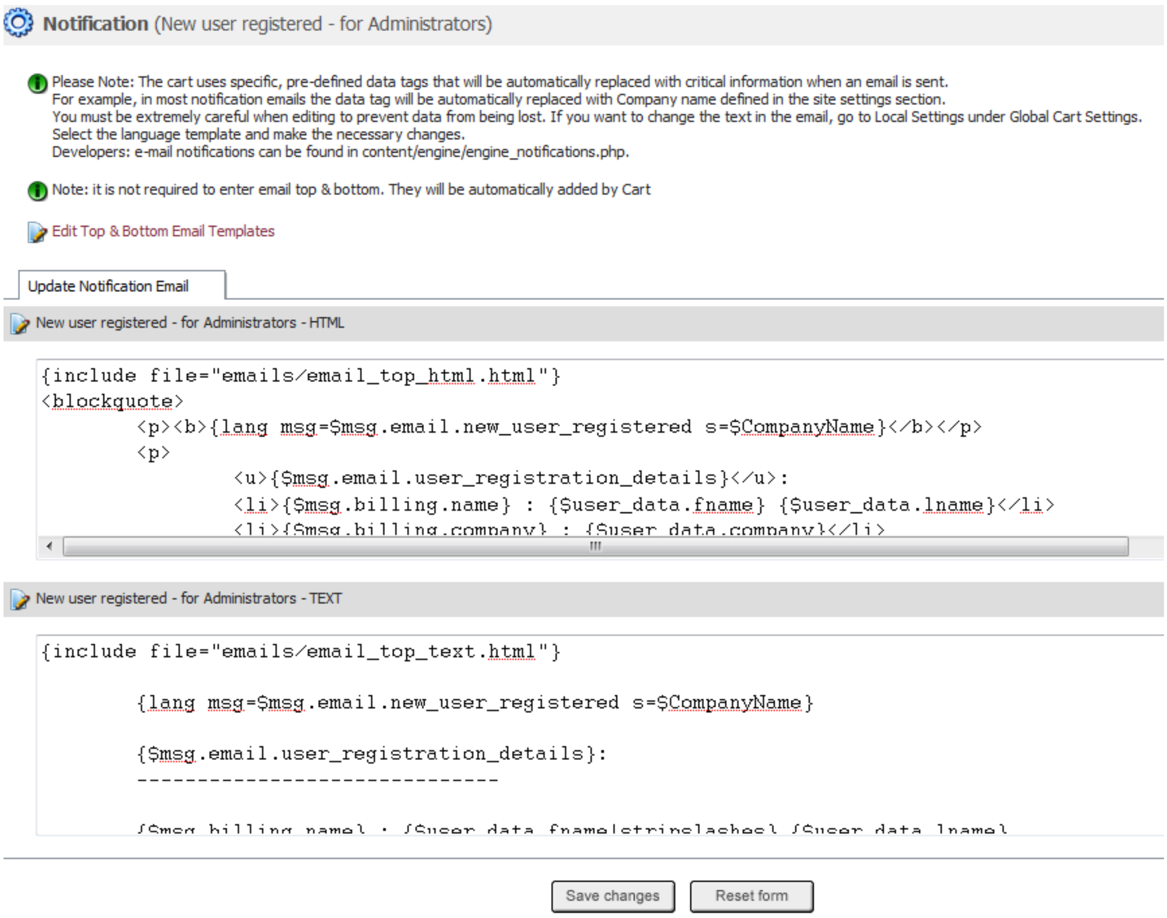


Figure 4-5-3: Edit Email Notification Page

5. If you want to cancel or start again, click on the **Reset form** button.
6. Click **Save changes** button to save email template for the email type. You can view the confirmation message on top of the **Edit Email Notification** page, as shown in the Figure 4-5-4 below.

Figure 4-5-4: Saved Confirmation

7. Click **OK**.

4.6 Manage Subscribers Email Addresses Overview

This section is used for searching the email address of the subscribers such as News and Updates Subscribers, Newsletters Subscribers, etc. In addition, you can also modify the subscriber's information and delete subscriber's email from the mail list. To know more about managing subscribers email addresses, click on the links below.

Search Subscribers Email Addresses 86
Edit 87
Delete 88

4.6.1 Search Subscribers Email Addresses

For **searching the email address of the subscribers**, follow the steps:

1. Click **Manage Subscriber Email Addresses**, as shown in the Figure 4-6-1 below.

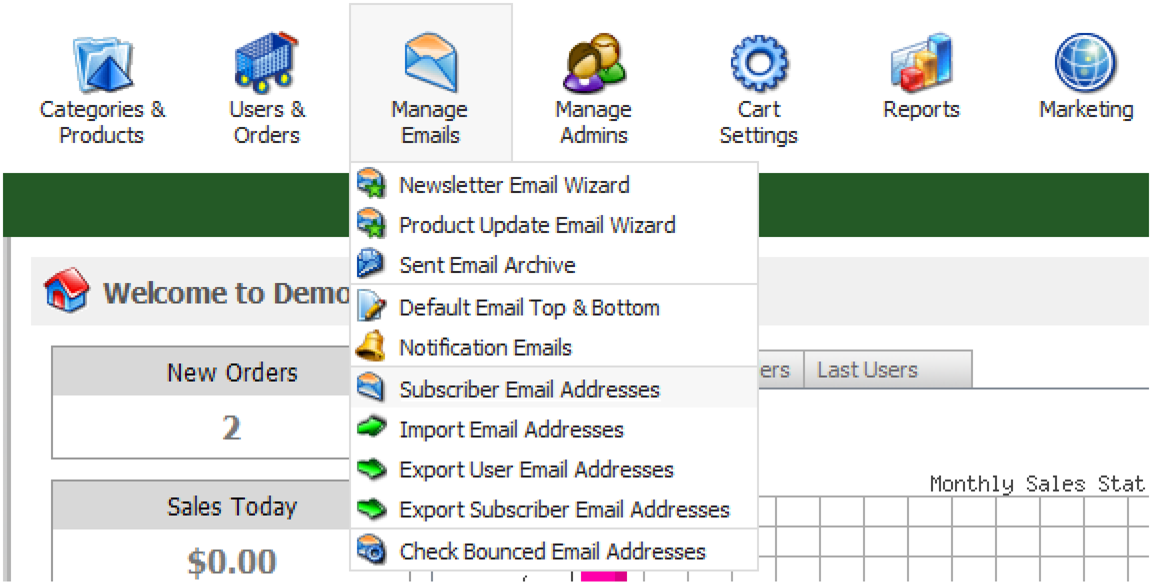


Figure 4-6-1: Manage Subscribers Emails

The **Manage Subscriber Email Addresses** page will open, as shown in the Figure 4-6-2 87 below.

Note: You can also directly open the **Manage Subscriber Email Addresses** page, by clicking on the **Manage Subscriber Emails** link in the Admin Area Home page 8.

2. **Search Subscribers Base:** Enter the following information:
   a. **Search by date:** Select the starting and ending date from the drop down menu, if you want to search the subscribers email list on the basis of date.

b. **Search by email:** Enter the email Address, if you want to search the subscribers email list on the basis of email.

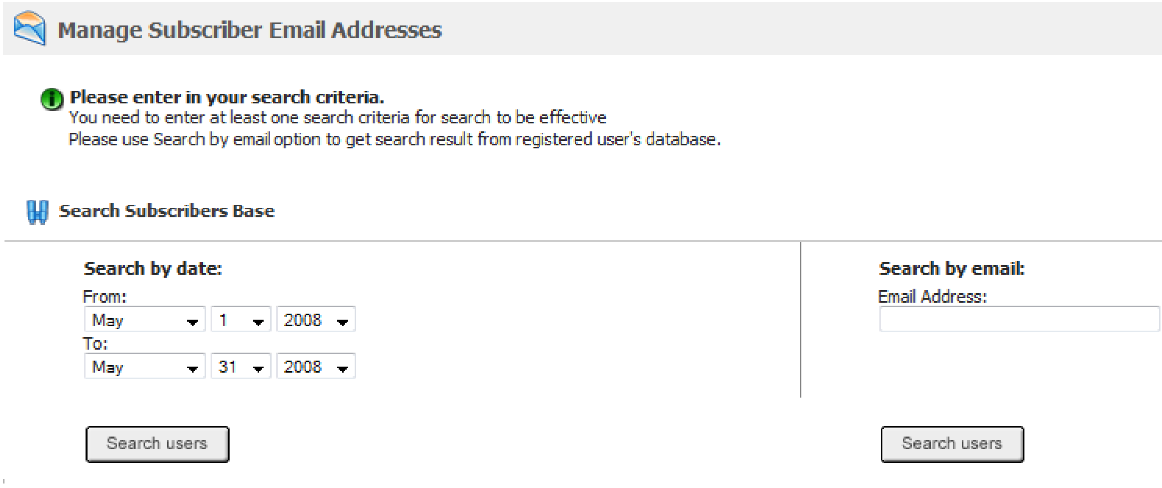


Figure 4-6-2: Manage Subscriber Email Addresses

3. Click on the **Search users** button.
4. Scroll down to the bottom of the **Manage Subscriber Email Addresses** page, to view the **email address of the subscribers**, as shown in the Figure 4-6-3 below.

Note: You can view all the **imported email addresses** in the subscribers list. To know more about **importing email addresses**, click here 89.

You can also **edit** and **delete** the email address of the subscribers from the **Email addresses of subscribers** page. To know more about editing 87 and deleting 88 **email addresses of the subscribers**, click on each of the links.

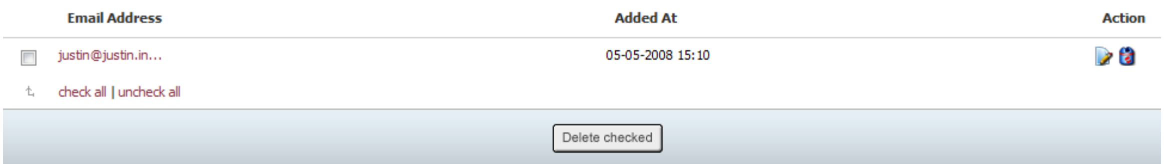


Figure 4-6-3: Email addresses of subscribers

4.6.2 Edit Subscribers Email Addresses

To **edit the email address of the subscribers**, follow the steps:

1. Open 86 the **Email addresses of subscribers** page.
2. Click on the **Edit email** icon for the subscriber, you want to view or edit email information.

The **Edit Subscriber's Email (select)** page will open, as shown in the Figure 4-7-1

88 below.

Note: You can remove the email address of the subscribers by clicking on **Remove this e-mail from subscribers list** link. A confirmation box pops-up, as shown in the Figure 4-8-1 89. Click **OK** button to confirm deletion.

You can also click on **Browse Subscriber Emails** link to return back to Manage Subscriber Email Addresses page 87.

3. **Basic Information:** Enter the following information:
   a. **Subscriber Email Address:** You can modify the subscriber email address.
   b. **Subscribe to newsletter mail list:** Select **Yes** from the drop down menu to subscribe to newsletter mail list. Selecting **No** will unsubscribe you from the newsletter mail list.
   c. **Subscribe to products updates mail list:** Select **Yes** from the drop down menu to subscribe to the product updates mail list. Selecting **No** will unsubscribe you from the products updates mail list.

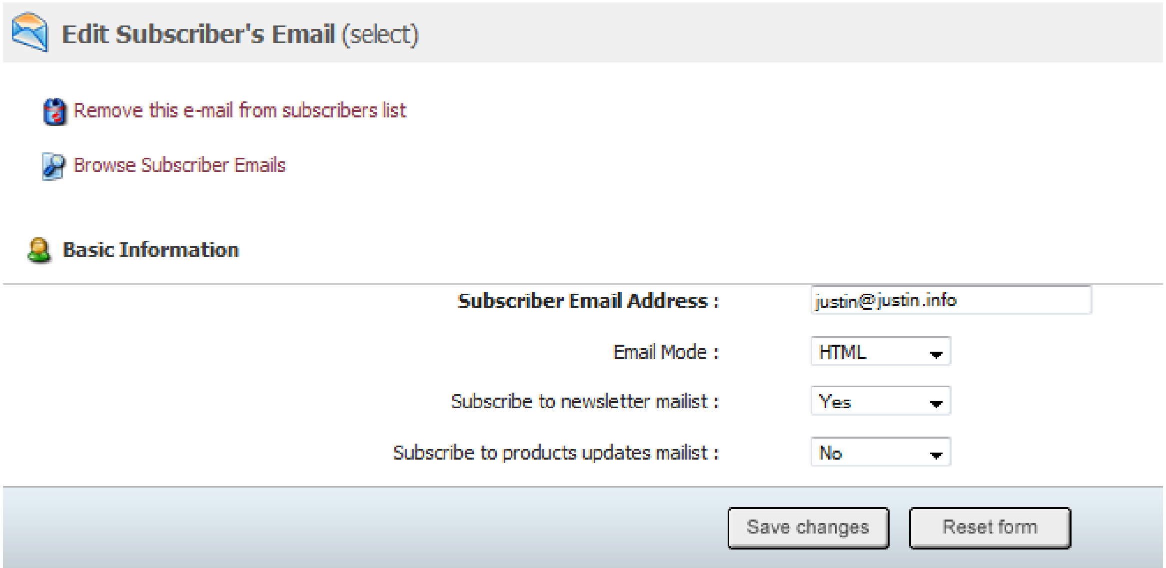


Figure 4-7-1: Edit Subscriber's Email (select)

4. If you want to cancel or start again, click on the **Reset form** button.
5. Click **Save changes** button to update the information.

4.6.3 Delete Subscribers Email Addresses

To **delete the email address of the subscribers**, follow the steps:

1. Open 86 the **Email addresses of subscribers** page.
2. Click on the **Delete email from subscribers list** icon for the subscriber.

Note: You can also **delete email address of the subscribers** from the mail list by checking the box and then, clicking on the **Delete checked** button. A pop up appears asking for confirmation. Click **OK** button.

If you wish to delete all subscribers, click **check all** link and then click **Delete checked** button. A pop up appears asking for confirmation. Click **OK** button to confirm deletion.

A pop up appears asking for confirmation, as shown in the Figure 4-8-1 below.

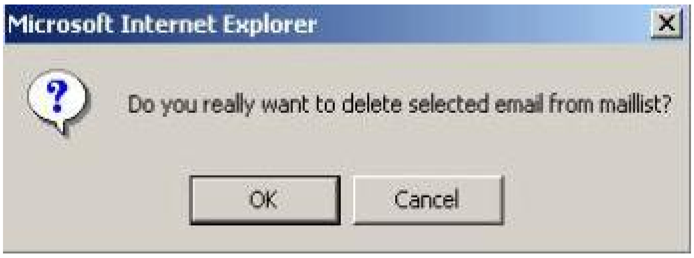


Figure 4-8-1: Delete Confirmation

3. Confirm deletion process, by clicking **OK** button. You will get a confirmation message that the email has been successfully removed.

4.7 Import Email Addresses

You can use this section to import email addresses. The imported email addresses will be added to the subscribers list.

For **importing email addresses**, follow the steps:

1. Click **Import Email Addresses**, as shown in the Figure 4-9-1 below.

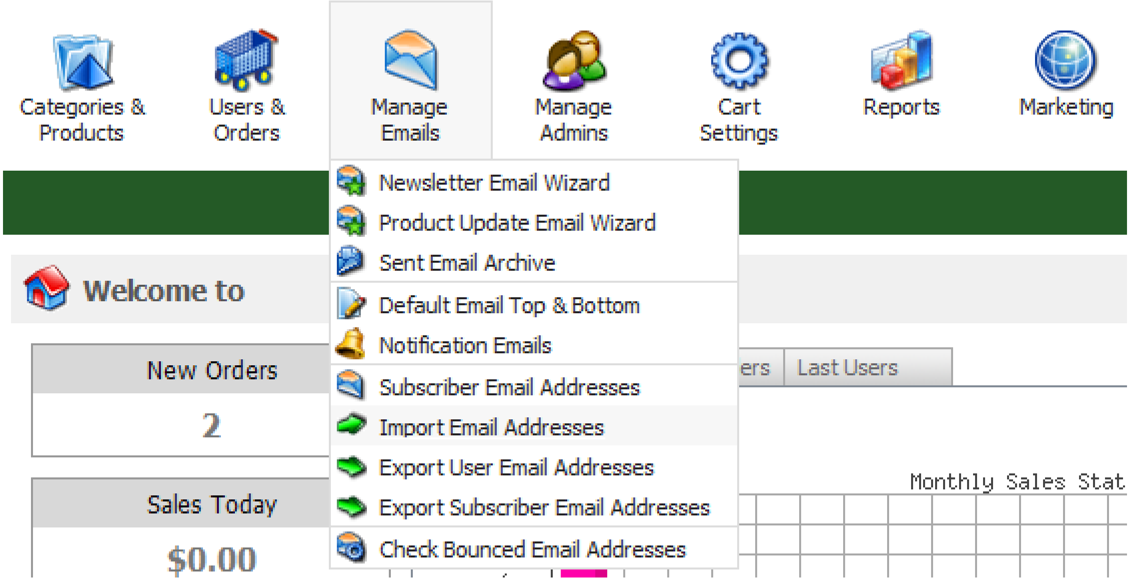


Figure 4-9-1: Import Email Addresses

The **Import Email Addresses** page will open, as shown in the Figure 4-9-2 91 below.

Note: You can also directly open the **Import Email Addresses** page, by clicking on the **Import Emails** link in the Admin Area Home page 8.

2. Under **Import Email Addresses**, select from the drop down menu the format in which you would like to import the email addresses. There are three types of email list formats:
   - Email address per line
   - Comma-separated emails
   - Semicolon-separated emails
3. Enter or copy the email addresses under **Paste Email Addresses Here**.

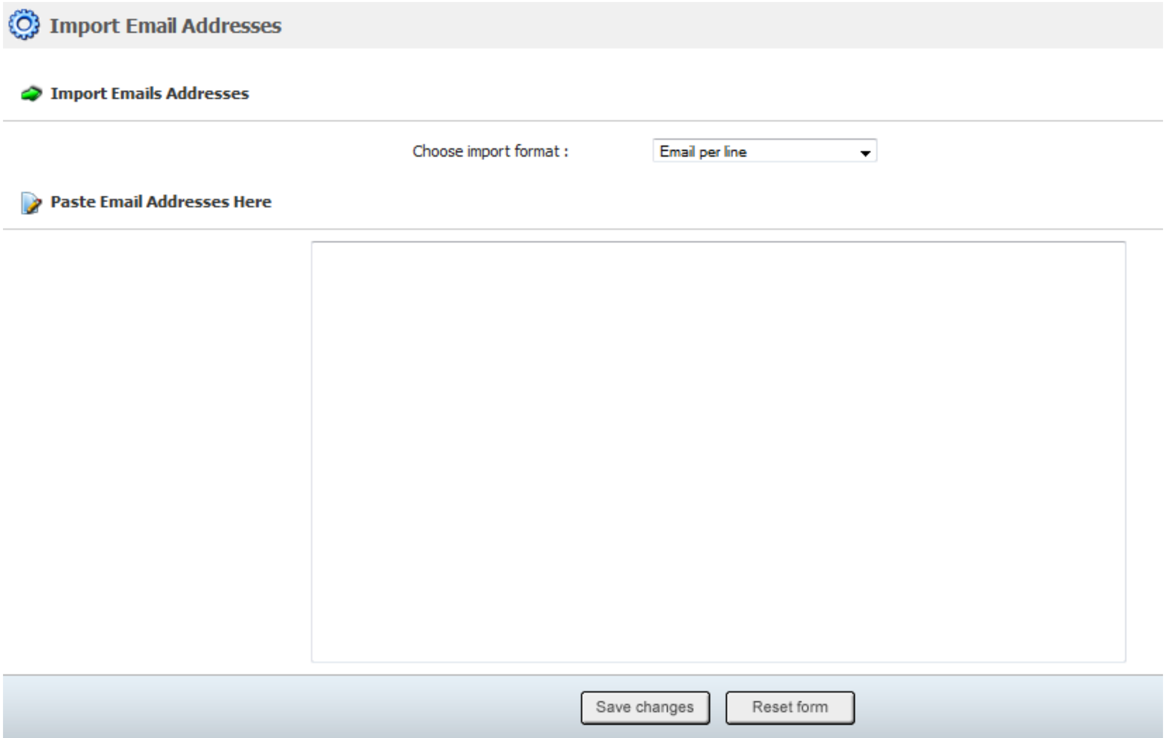


Figure 4-9-2: Import Email Addresses

4. If you want to cancel or start again, click on the **Reset form** button.
5. Click **Save changes** button to import the email addresses to the subscribers list.

4.8 Export User Email Addresses

You can use this section to export user email addresses.

For **exporting user email addresses**, follow the steps:

1. Click **Export User Email Addresses**, as shown in the Figure 4-10-1 below.

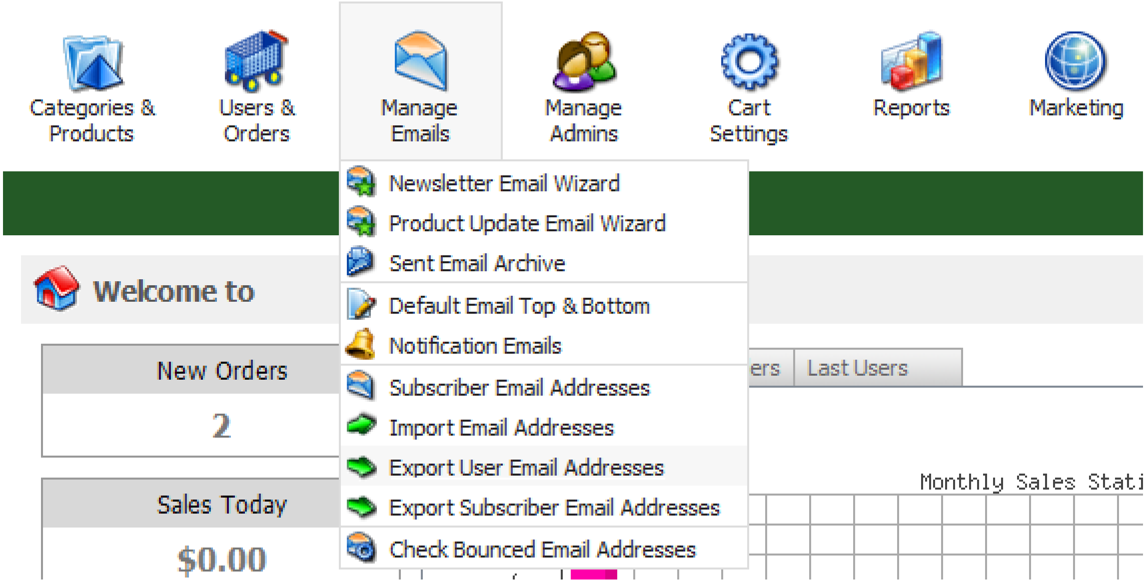


Figure 4-10-1: Export User Email Addresses

The **Export User Email Addresses** page will open, as shown in the Figure 4-10-2 93.

Note: You can also directly open the **Export User Email Addresses** page, by clicking on **Export User Emails** link in the Admin Area Home page 8.

2. Under **Export User Email Addresses**, select from the drop down menu the subscriber's list and the format in which you would like to export the emails list. There are four types of email list formats:
   - Show as "name1" <email1>, "name2" <email2>
   - Comma-separated emails
   - Semicolon-separated emails
   - Email address per line

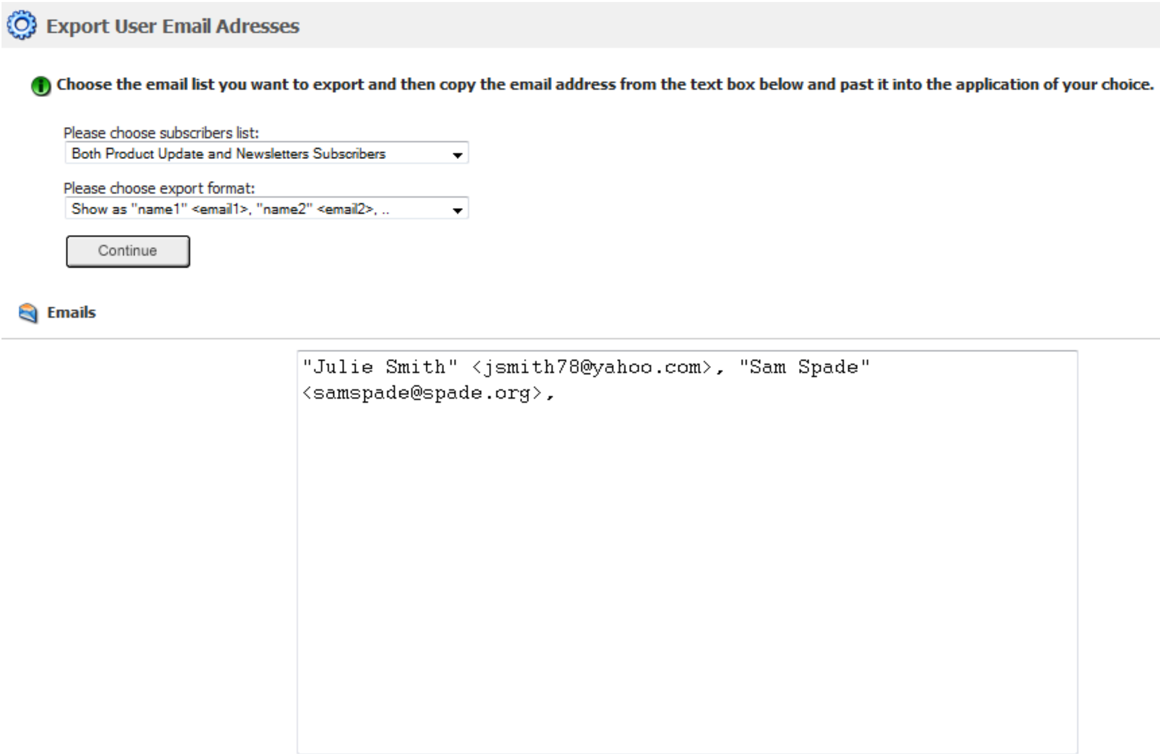


Figure 4-10-2: Export User Email Addresses Page

3. Click **Continue** button to export the user email addresses. You can then copy/ paste the exported user email addresses from the **Emails** text area in application you need.

4.9 Export Subscriber Email Addresses

You can use this section to export subscriber email addresses.

For **exporting subscriber email addresses**, follow the steps:

1. Click **Export Subscriber Email Addresses**, as shown in the Figure 4-11-1 below.

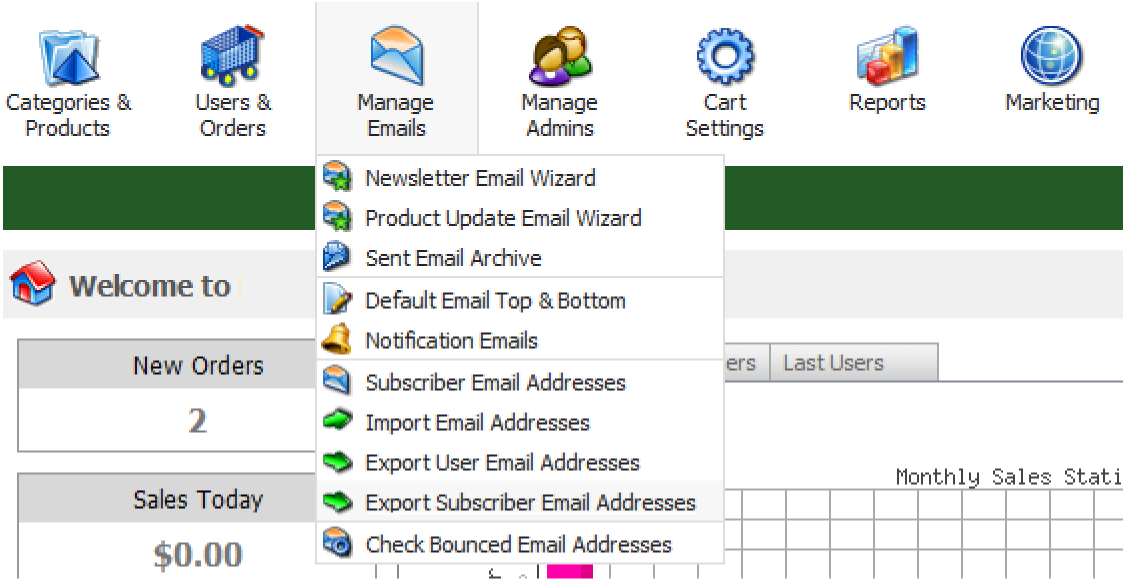


Figure 4-11-1: Export Subscriber Email Addresses

The **Export Subscriber Email Addresses** page will open, as shown in the Figure 4-11-2 95.

Note: You can also directly open the **Export Subscriber Email Addresses** page, by clicking on the **Export Subscriber Emails** link in the Admin Area Home page 8.

2. Under **Export Subscriber Email Addresses**, select from the drop down menu the format in which you would like to export the emails list. There are four types of email list formats:
   - Show as "name1" <email1>, "name2" <email2>
   - Comma-separated emails
   - Semicolon-separated emails
   - Email address per line

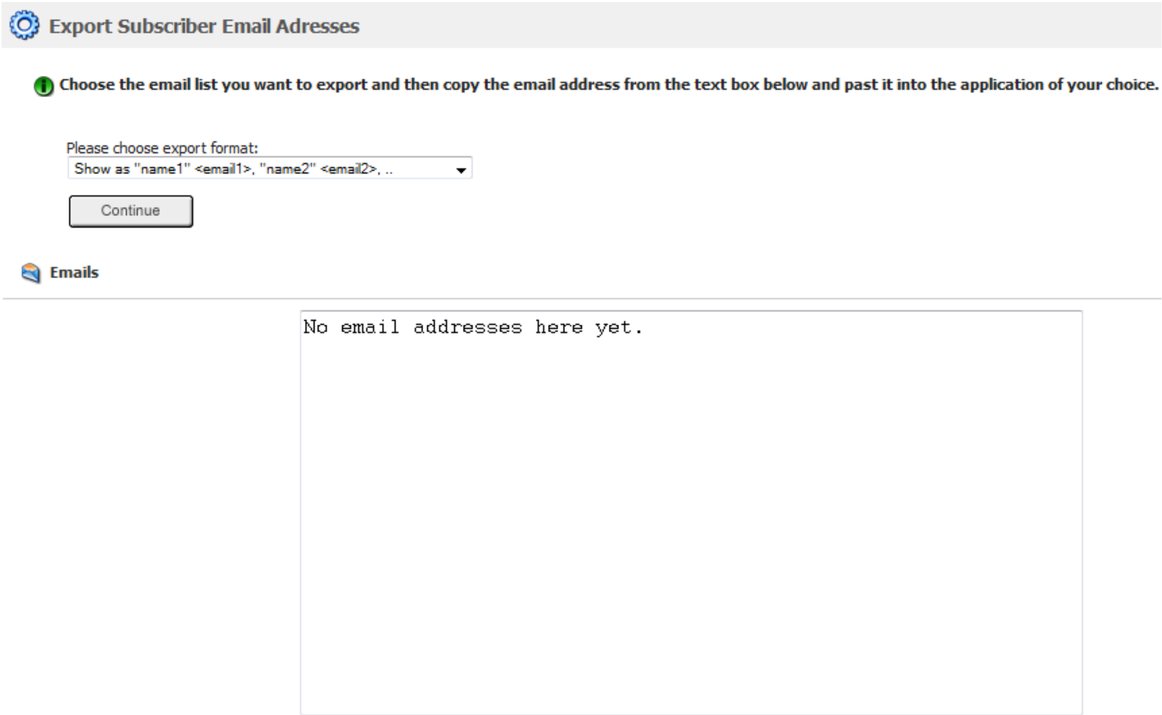


Figure 4-11-2: Export Subscriber Email Addresses Page

3. Click **Continue** button to export the subscriber email addresses in the selected format under **Emails**, as shown in the Figure 4-11-3. You can then copy/paste the exported subscriber email addresses from the **Emails** text area in application you need.

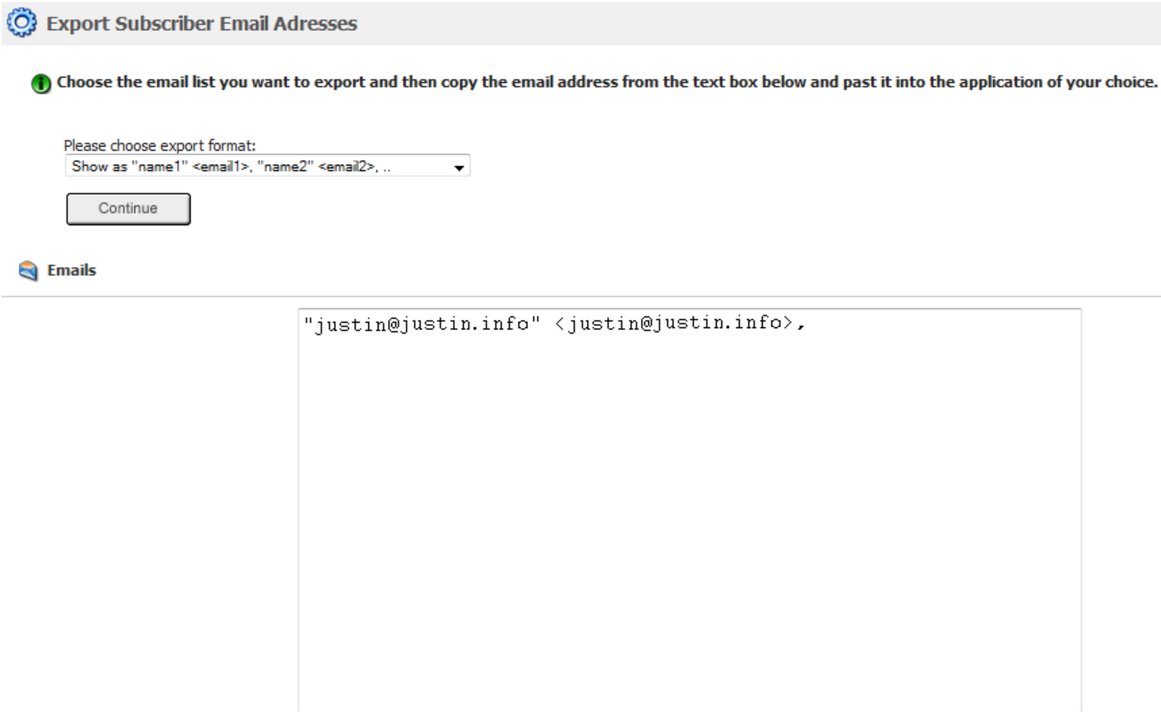


Figure 4-11-3: Emails Address of Subscribers

4.10 Check Bounced Email Addresses

This section will allow you to remove bad and bounced email addresses from your email list. It will login to the POP3 email server you selected and conduct a scan on returned email address.

Note: Before running this feature, enter information regarding your email account in **POP3 Email Settings** under **Global Cart Settings**. To know more about **POP3 Email Settings**, click here 128.

For **managing the bounced emails**, follow the steps:

1. Click **Check Bounced Email Addresses**, as shown in the Figure 4-12-1 below.

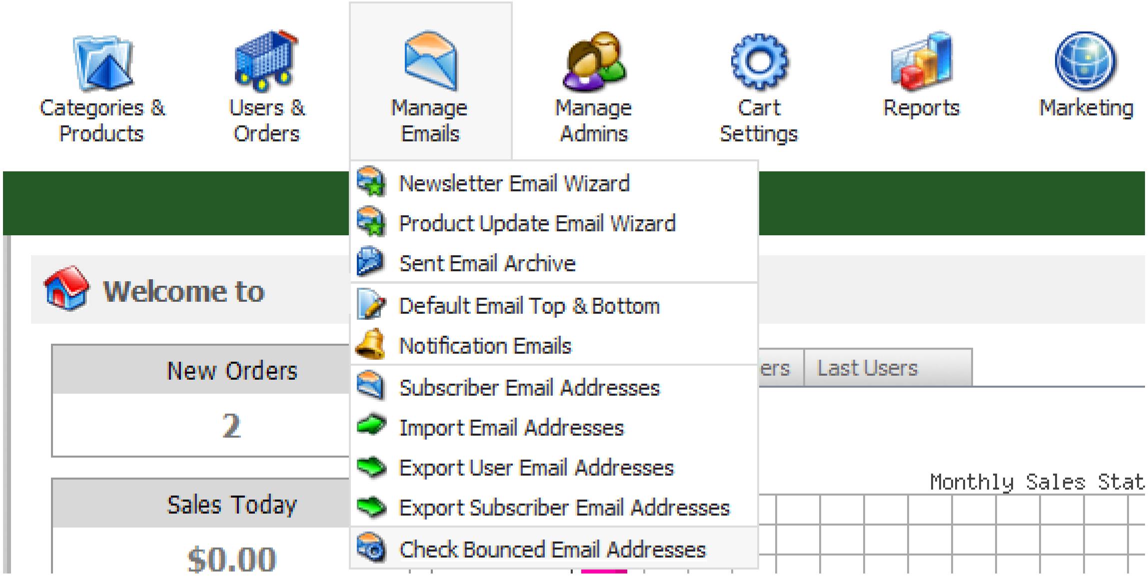


Figure 4-12-1: Check Bounced Email Addresses

Check Bounced Email Addresses (Step 1 of 3) page will open, as shown in the Figure 4-12-2.

Note: You can also directly open the **Check Bounced Email Addresses (Step 1 of 3)** page, by clicking on the **Check Bounced Emails** link in the Admin Area Home page 8.

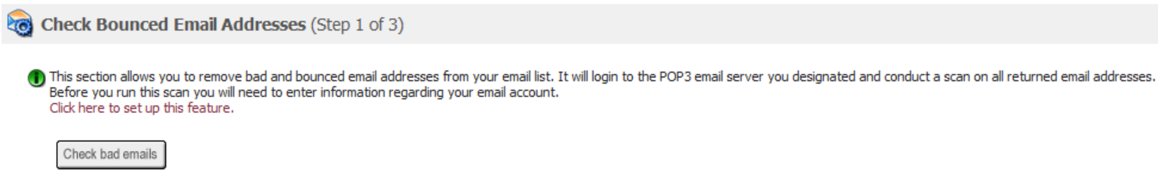


Figure 4-12-2: Check Bounced Email Addresses (Step 1 of 3)

2. Click on the **Check bad emails** button to open **Check Bounced Email Addresses (Step 2 of 3)** page, where you can view all the bounced email addresses.

Top Level Intro

This page is printed before a new
top-level chapter starts

Part V

5 Manage Admins

5.1 Administrator Overview

This section is used to create a new administrator account, edit or delete an existing administrator account. In addition, you can also update your profile. It has 4 sub sections:

Create a New Administrator Account 99
Browse Administrators 101
Edit an Existing Administrator Account 102
Delete 17
Update Your Profile 104

5.1.1 Create a New Administrator Account

To **create a new administrator account**, follow the steps:

1. Click **Create a New Account**, as shown in the Figure 5-1-1 below.

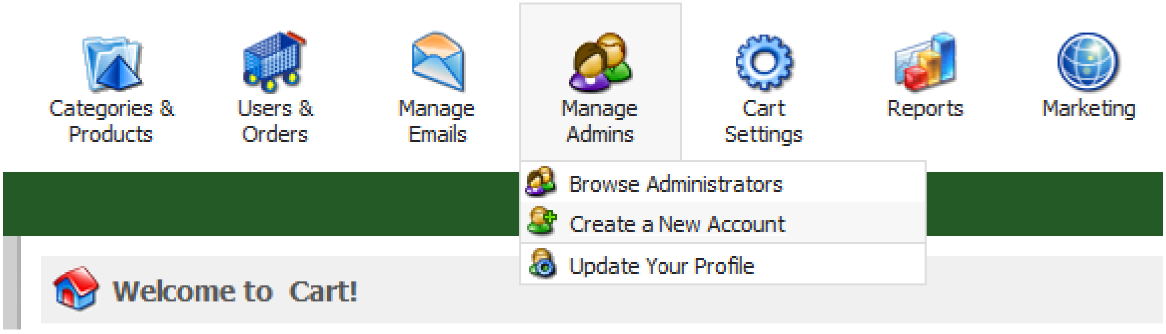


Figure 5-1-1: Create New Administrator Account

The **Site Administrator (insert)** page will open, as shown in the Figure 5-1-2 100.

Note: You can also directly open the **Site Administrator (insert)** page, by clicking on **Create a New Account** link in the Admin Area Home page 8.

2. **Basic Information & Security:** Enter the following information:
   a. **Full Name:** Type the full name of the person.
   b. **Email:** Type his email address.
   c. **Email type:** Select from the drop down menu the Email type (Plain text messages or HTML-enriched messages).

Note: You can also select whether the person will receive **invoice notifications**, **out of stock messages**, **new user registration notifications** or **all** by checking the boxes.

d. **Username:** Enter a unique user name.
e. **Password:** Enter the password for this username.
f. **Password Confirmation:** Re Type the password.

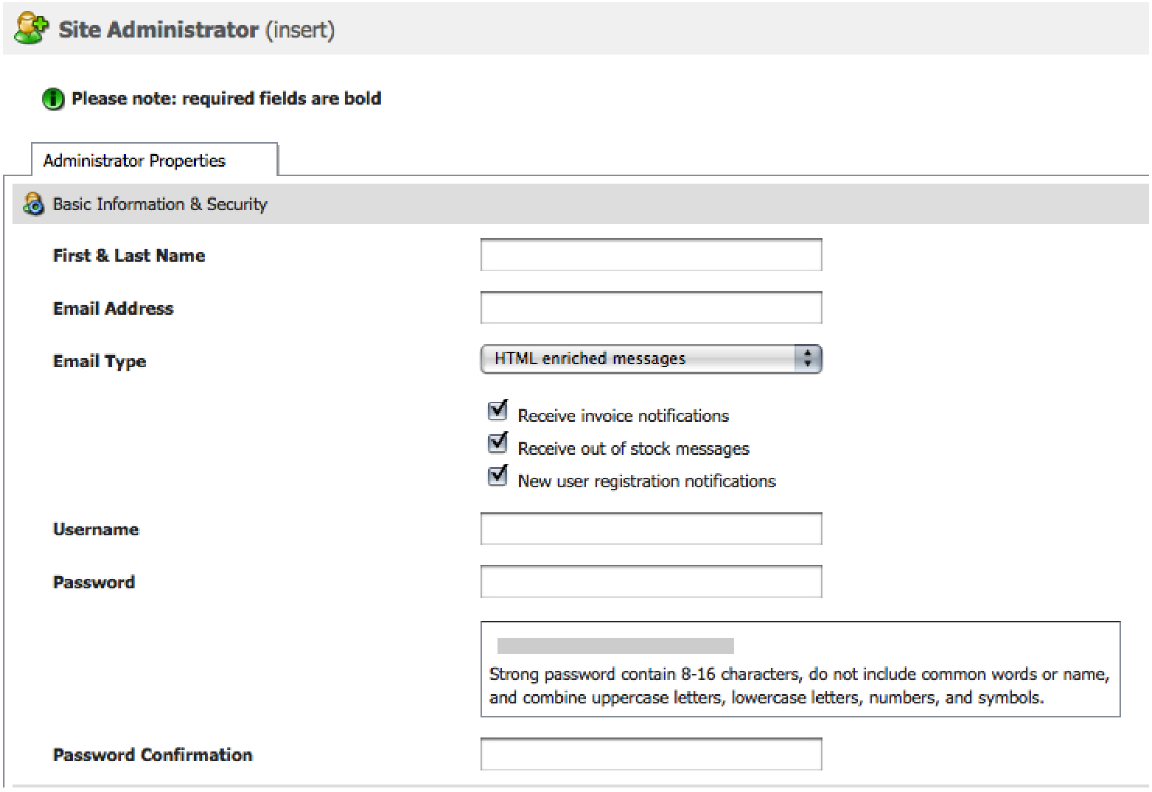


Figure 5-1-2: Basic Information & Security

3. **Administrator Privileges:** You can also select the level of access you would like to give to this administrator by clicking the check boxes. You must select at least one privilege by clicking in the box next to it.

Note: Select **Yes** from the **Account Active** drop-down menu to activate this administrator account whereas select **No** to de-activate the account.

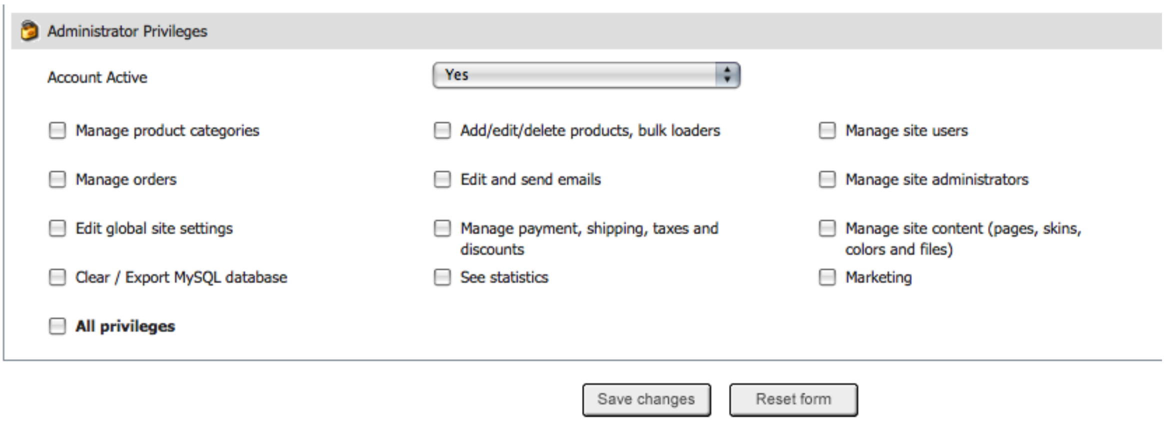


Figure 5-1-3: Administrator Privileges

4. If you want to cancel or start again, click on the **Reset form** button.
5. Click **Save changes** button to save details about the new administrator account. You will get a confirmation message that the new administrator account has been successfully created.

5.1.2 Browse Administrators

You can use this section to browse, edit and delete an existing administrator account. To **browse administrator**, follow the steps:

1. Click **Browse Administrators**, as shown in the Figure 5-2-1 below.

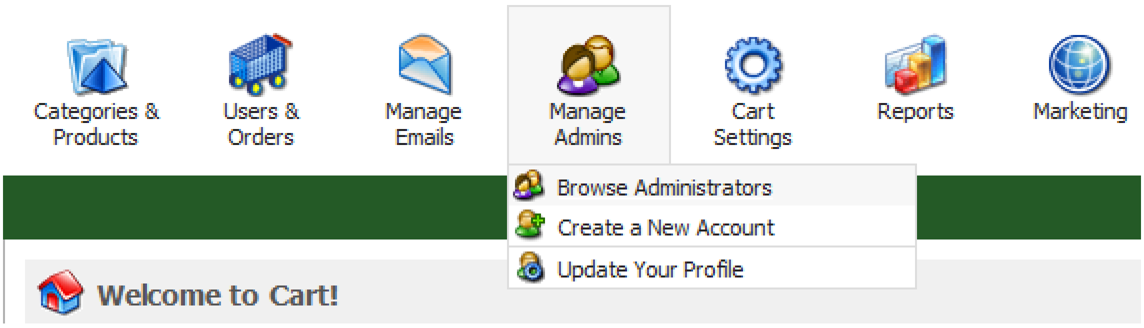


Figure 5-2-1: Browse Administrators

The **Site Administrators** page will open, as shown in the Figure 5-2-2 below.

Note: You can also directly open the **Site Administrators** page, by clicking on the **Browse Administrators** link in the Admin Area Home page 8.

You can also **create a new administrator account** from Site Administrators page 102, by clicking on **Create a New Administrator Account** link on the top of the page.

Your account will not be listed in **Site Administrators** page because you are browsing other accounts in your company. However, you can update your own profile

104 by clicking on **Update Your Profile** link on the top of the page.

2. You can edit 102 ( ) and remove 17 ( ) existing administrator account by clicking on the respective icons.

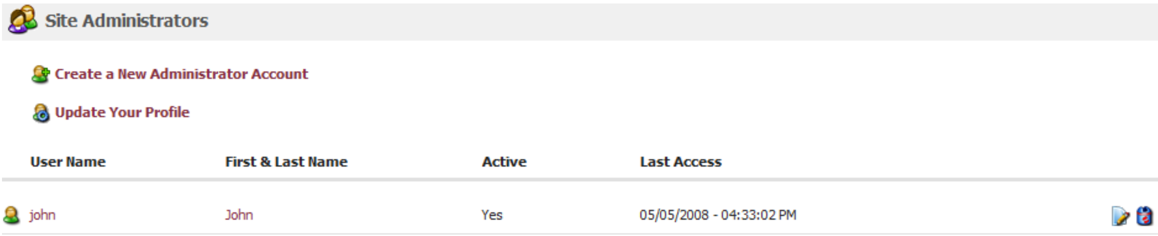


Figure 5-2-2: Site Administrators

3. Go to these links to know further about how to:
   Edit an Existing Administrator Account 102
   Delete an Existing Administrator Account 17

5.1.3 Edit an Existing Administrator Account

You can use this section to edit an existing administrator account. To **edit an existing administrator account**, follow the steps:

1. Open 101 the **Site Administrators** page.
2. Click **Edit Account** icon for an account you want to modify.
3. The **Site Administrator (update)** page will open, as shown in the Figure 5-3-1 103 below where you can **edit** the various fields.

Note: You can also **delete this account** from the **Site Administrator (update)** page. To **delete the account**, click **Remove this account** link on top of the page.

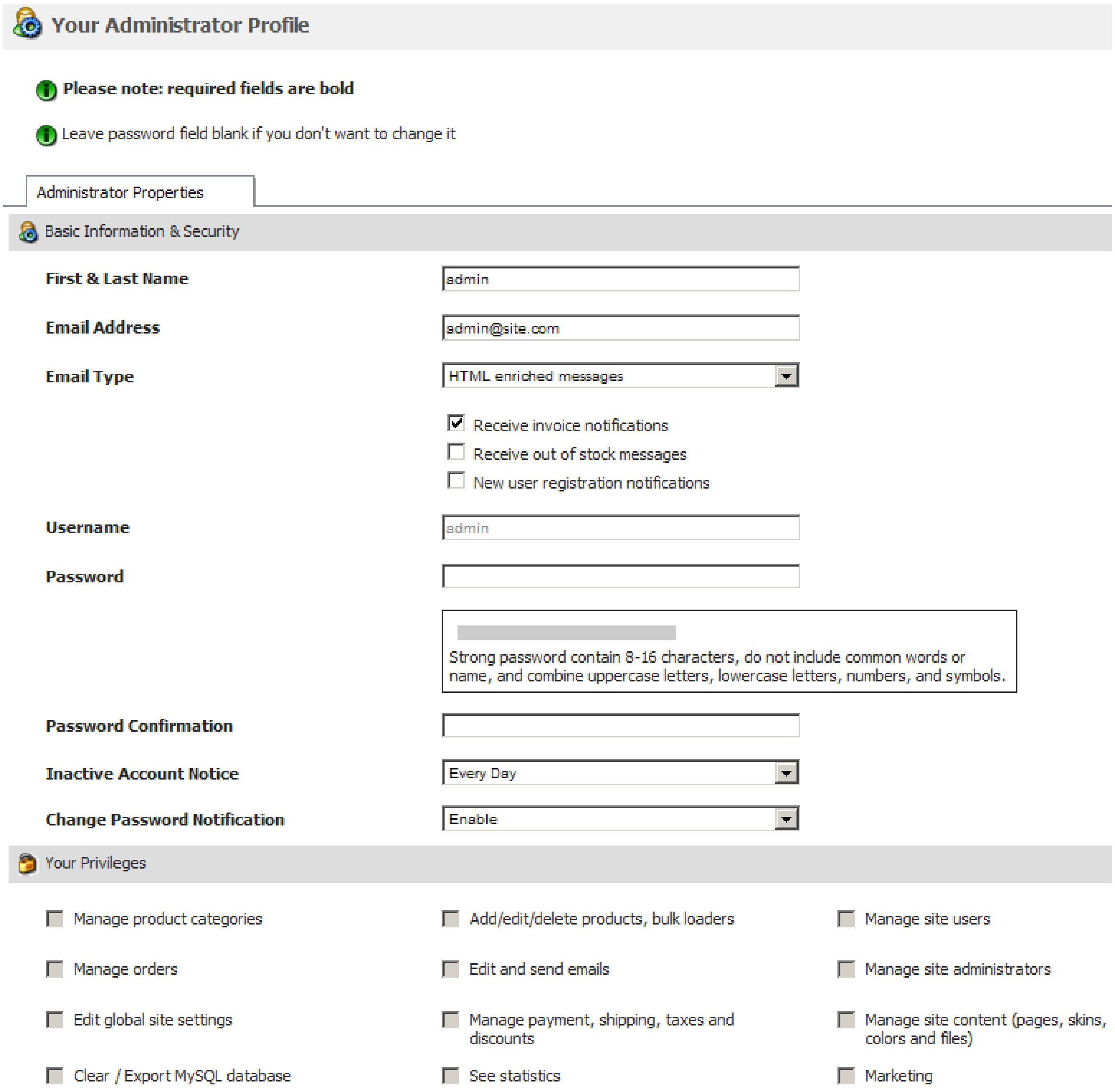


Figure 5-3-1: Site Administrator (update) Page

4. If you want to cancel or start again, click on **Reset form** button.
5. Click **Save changes** button to update the information. You will get a confirmation message that the administrator account has been successfully updated.

5.1.4 Delete an Existing Administrator Account

You can use this section to delete an existing administrator account. To **delete an existing administrator account**, follow the steps:

1. Open 101 the **Site Administrators** page.

2. Click **Delete Account** icon for a category you want to remove. A pop up appears asking for confirmation, as shown in the Figure 5-4-1 below.

3. Confirm deletion process, by clicking **OK** button. You will get a confirmation message that the administrator account has been successfully removed.

5.1.5 Update Your Profile

You can use this section to update your own profile. To **update your own profile**, follow the steps:

1. Click **Update Your Profile**, as shown in the Figure 5-5-1 below.

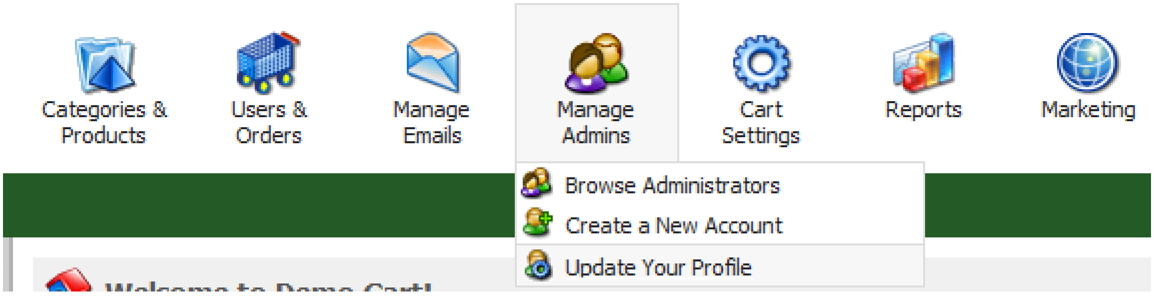


Figure 5-5-1: Update Your Profile

2. **Your Administrator Profile** page will open, as shown in the Figure 5-5-2 105 below where you can update the various fields and add more privileges, if all privileges are not selected.

Note: You can also directly open **Your Administrator Profile** page, by clicking on the **Update Your Profile** link in the Admin Area Home page 8.

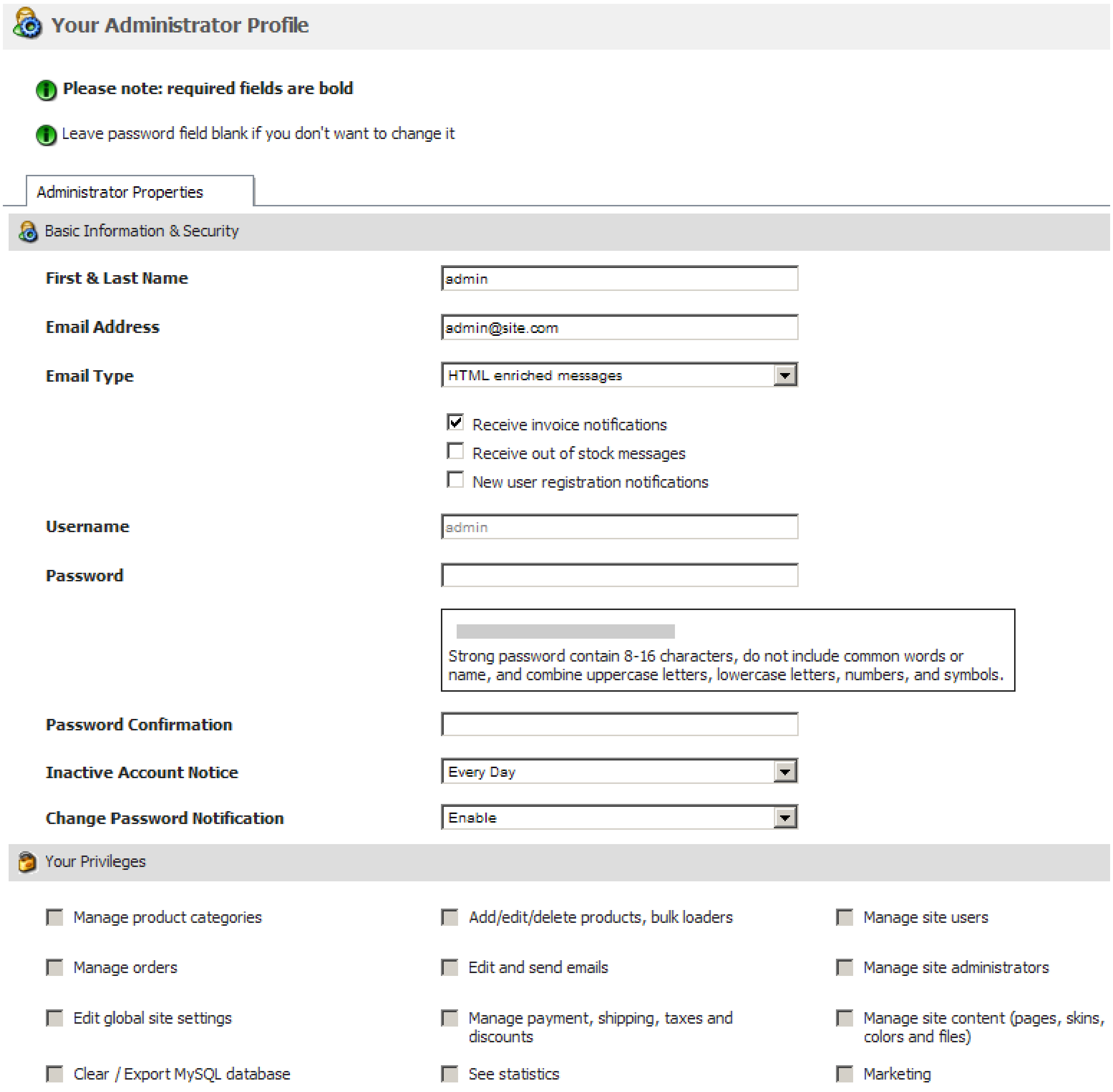


Figure 5-5-2: Update Administrator Profile

3. If you want to cancel or start again, click on **Reset form** button.
4. Click **Save changes** button to update your profile.

Top Level Intro

This page is printed before a new top-level chapter starts

Part VI

6 Cart Settings

You can use this section in order to manage the cart settings. To know in detail about the cart settings, click on respective links below:

Global Cart Settings Overview 107
Order Settings Overview 141
Shipping Management 167
Edit Taxes 181
Edit Discounts 186
Create Promo Codes 188
Enable Promo Codes 189
Delete Promo Codes 190
Appearance Settings Overview 190
Content Management Overview 212
Forms Control/ Custom Fields Overview 216
File Manager 220
Database & Back-up Tools 222

6.1 Global Cart Settings Overview

This section allows you to **select** the **cart setting** you would like to adjust. Select from the following cart settings:

Company Information 108: Used to enter the information about your company.
Global Site Settings 111: This section is used to enter information about administration e-mails, support e-mails and other information about Springboard Promocart.
Order/Cart Settings 112: Settings for how visitors use Springboard Promocart.
Security Settings 115: This section is used to manage the following information: Cookie Prefix, User Session Timeout, Order Timeout, Account Blocking on failed payment transactions, Number of hours Account is Blocked, Number of time Account Access can fail before access is denied, etc.
Bestsellers Settings 118: In this section, you can provide settings for your most popular products.
Proxy Settings: 120 This area will allow you to run the cart on proxy servers.
Gift Message 121: This section allows you to enable or disable gift messaging.
Digital Products 122: This section allows you to enable or disable Digital Produces and set download limit for downloading digital products.
Printable Invoice Settings 124: This section allows you to set print invoice height and manage the company information for the printable invoice page.
Search Engine Settings 126: This section is used to enter Search Engine information like Meta Keywords, Auto generation of additional keywords, Use of URL Transformation for Products-Catalog & Text etc.
Wholesale Settings 127: This section is used for Advanced Wholesales Support and allows companies who will wholesale to apply Case Pack and Inter Pack fields to the Add a Product Page.
Pop3 Email Settings 128: Use this section to set up POP3 email account for managing bounced and bad email addresses.
Country List 130: Use this section to enable countries you sell your products. You can view all the enabled countries during the checkout process.

Local Settings 132: Use this section to manage the site local settings, customize the cart to specific currencies and add a new language template to Springboard Promocart.

6.1.1 Company Information

In this section you can provide company contact information, which will appear, in customer communications on the website.

To provide company contact information, follow the steps:

1. Click **Global Cart Settings**, as shown in the Figure 6-1-1 below.

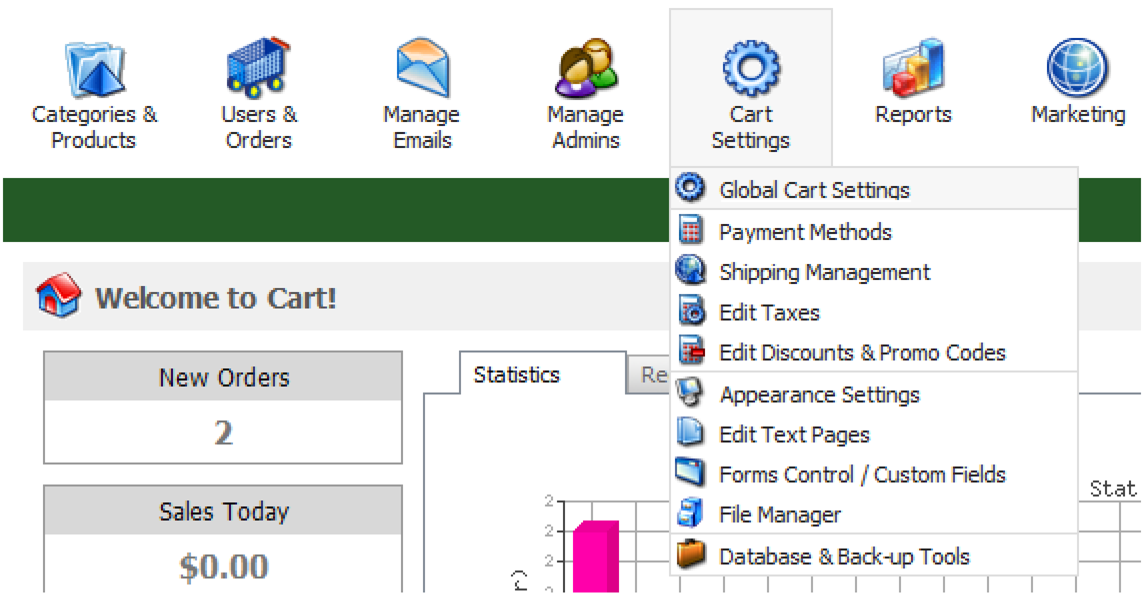


Figure 6-1-1: Select Global Cart Settings

2. **Global Cart Settings** page will open, as shown in the Figure 6-1-2 109 below.

Note: You can also directly open the **Global Cart Settings** page, by clicking on the **Global Cart Settings** link in the Admin Area Home page 8.

The **Global Cart Settings** page, allows you to select any of the **cart settings** (such as Company Information 108, Global Site Settings 111, Order/Cart Settings 112, Security Settings 115, Bestsellers Settings 118, Gift Message 121, Digital Products 122, Printable Invoice Settings 124, Search Engine Settings 126, Wholesale Settings 127, Pop3 Email Settings 128, Country List 130 and Site Local Settings 132) you would like to adjust.

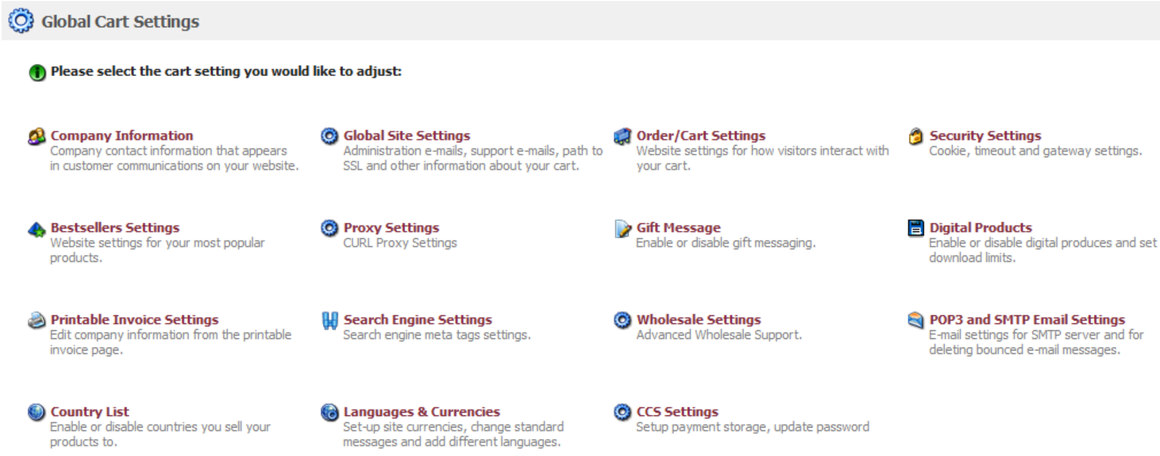


Figure 6-1-2: Global Cart Settings

3. Click **Company Information**.

The **Company Information** page will open, as shown in the Figure 6-1-3 110 below.

4. **Company Information:** Enter the following information:
   a. **Company Name:** Type the name of your company.
   b. **Company Address Line 1:** Enter the street name and number of your company's primary address.
   c. **Company Address Line 2:** Enter any secondary address information such as PO Box, suite number or floor number. This is not a mandatory field.
   d. **Company City:** Type the city where the company is located.
   e. **Company State:** Type the state where the company is located.
   f. **Company Zip:** Enter the zip code or postal code for your company's location.
   g. **Company Country:** Type the country where the company is located.
   h. **Company Phone:** Type the company’s phone no.
   i. **Company Fax:** Type the company’s fax no. This is not a mandatory field.
   j. **Company Website:** Type the company’s website address.
   k. **Company Email:** Enter the email address you wish to use as your company's primary email. This email address will appear on all invoices issued by your company.
   l. **Company Slogan:** Type the company slogan, if there is any, so it will appear on all invoices. This is not a mandatory field.

Note: All the required values are in bold in the **Company Information** page.

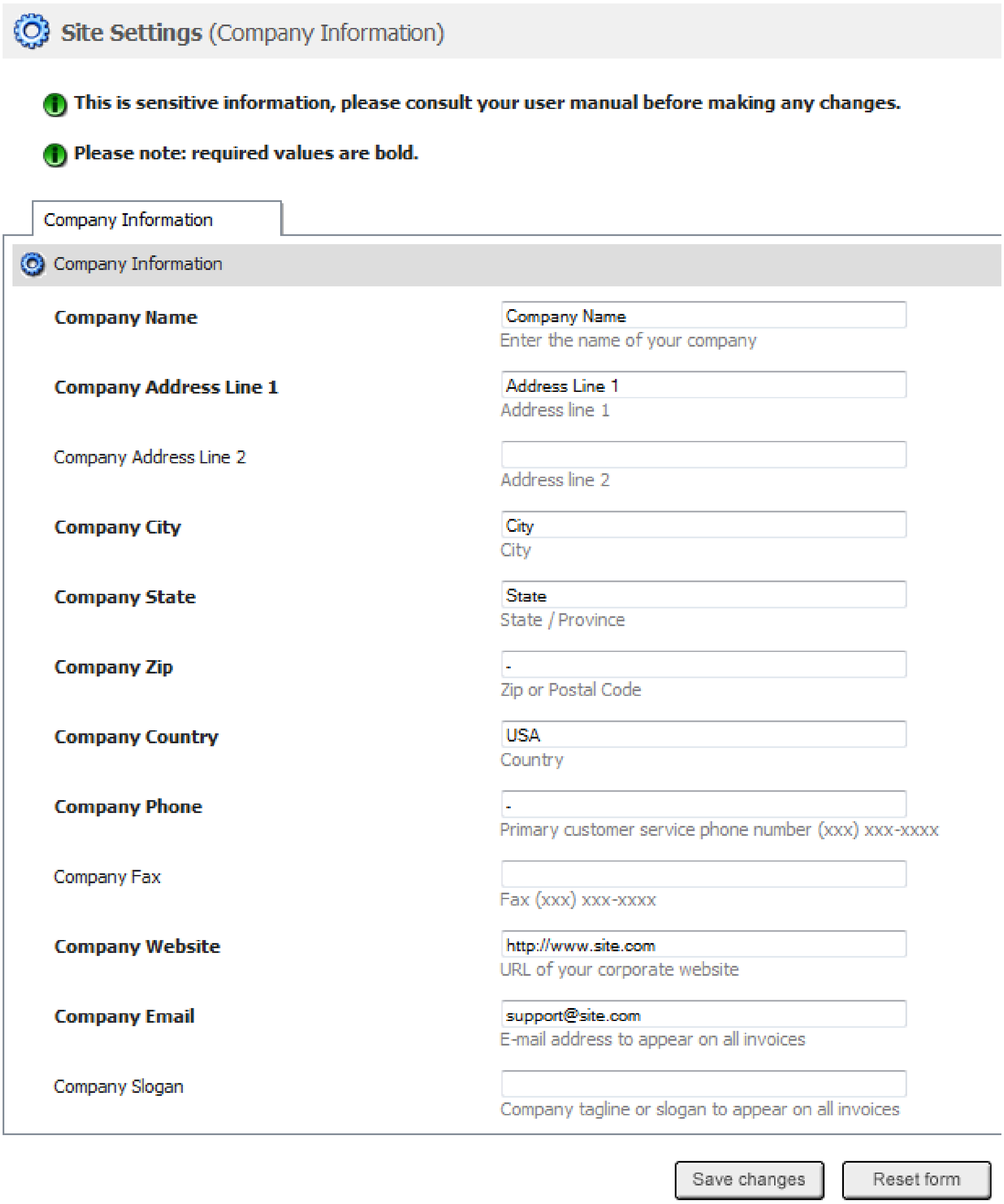


Figure 6-1-3: Company Information Page

5. If you want to cancel or start again, click on **Reset form** button.
6. Click **Save changes** button to save details about **Company Information**.

You can view the confirmation message on top of the **Company Information** page, as shown in the Figure 6-1-4 below.

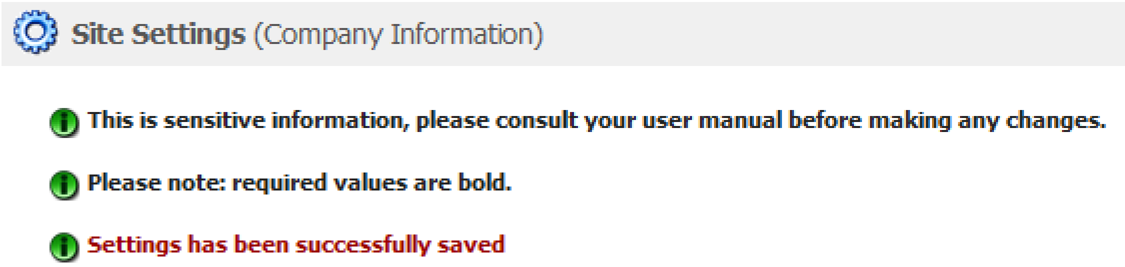


Figure 6-1-4: Save Confirmation

6.1.2 Global Site Settings

This section is used to enter information about administration e-mails, support e-mails and other information about Springboard Promocart.

To go to **global site settings** page, follow the steps:

1. Open 108 the **Global Cart Settings** page.
2. Click on **Global Site Settings**.

The **Global Site Settings** page will open, as shown in the Figure 6-2-1 112 below.

Note: All the **required values** are in bold in the **Global Site Settings** page.

3. **Global Site Settings:** Enter the following information:
   a. **Global Site Name:** Enter the name displayed on your web site as the Site Name.
   b. **Global Notification Email:** Enter the email address, which will be seen by the customers who receive emails from your company.
   c. **Global Support Email:** Enter the email address for your company that will be used and displayed for customers to write to when they are in need of help.
   d. **Global Http Url:** Enter the URL for your web site, including the prefix http://www.

Note: If you are using the software as both your website and Springboard Promocart, enter the website address here (example: http://www.mystore.com) whereas if you have additional pages that are included with Springboard Promocart, enter the website address where Springboard Promocart is located (example: http://www.mystore.com/cart).

   e. **Global Https Url:** Enter the URL for your web sites secure pages, including the prefix https://www.

Note: Do not enter the slash symbol (/) in the website address.

   f. **Global Server Path:** Enter the full path of the cart location on your server.

Note: Do not enter the slash symbol (/) in the website address.

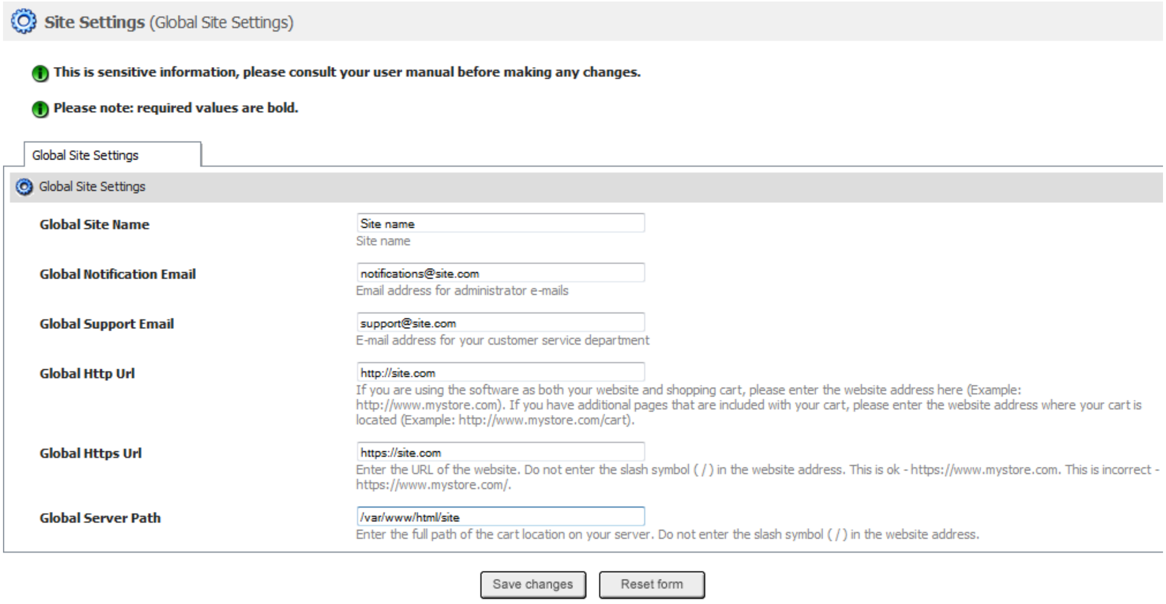


Figure 6-2-1: Global Site Settings Page

4. If you want to cancel or start again, click on the **Reset form** button.
5. Click **Save changes** button to save details about **Global Site Settings**.

You can view the confirmation message on top of the **Global Site Settings** page, as shown in the Figure 6-2-2 below.

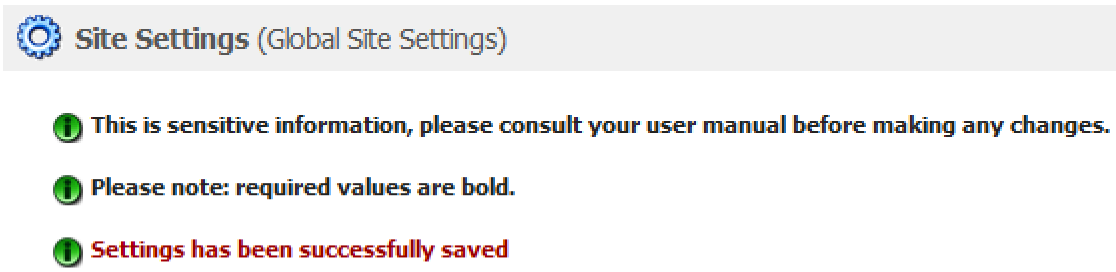


Figure 6-2-2: Save Confirmation

6.1.3 Order/Cart Settings

This section is used to do the settings how you want visitors to use Springboard Promocart.

To go to **order/cart settings** page, follow the steps:

1. Open 108 the **Global Cart Settings** page.
2. Click **Order/Cart Settings**.

The **Order/Cart Settings** page will open, as shown in the Figure 6-3-1 114 below.

3. **Order/Cart Settings:** Enter the following information:
   a. **Visitor See Price:** If you leave the default option, which is **Yes**, the site users who are not logged into your system, will be able to see the price of items displayed for sale. If **No** is selected, users have to be logged into the cart to view prices.
   b. **Visitor May Add Item:** Select **Yes** or **No** from the drop down menu as to whether customers, who have not logged into your system, will be allowed to place items to their Springboard Promocart. If you leave the default option, which is **Yes**, anyone on the site can add products to their Springboard Promocart whereas **No** only allows registered users to add products to the cart.
   c. **Allow Express Checkout:** Select **Yes** from the drop down menu, if you want to allow express checkout for users. If you leave the default option, which is **No**, user has to register before purchasing.
   d. **Min Order Number:** Enter the minimum number of order. By default, it remains **1**.
   e. **After Product Added Go To:** Select the next page (**Current Page** or **Cart Page**) from the drop-down menu that the user will view once the product is added to the cart. By default, the **Current Page** is selected.
   f. **Min Order Subtotal Level 0:** Minimal Order Subtotal Amount For Standard Users
   default value: 0.00.
   g. **Min Order Subtotal Level 1:** Minimal Order Subtotal Amount For Wholesalers at 1st Level
   default value: 0.00
   h. **Min Order Subtotal Level 2:** Minimal Order Subtotal Amount For Wholesalers at 2nd Level
   default value: 0.00
   i. **Min Order Subtotal Level 3:** Minimal Order Subtotal Amount For Wholesalers at 3rd Level
   default value: 0.00
   j. **Display Terms And Conditions Checkbox:** Would you like your customers to be agree with your site terms and conditions to continue checkout?
   default value: Yes
   k. **Enable Wish List:** Would you like your customers to use wish list feature?
   default value: No
   l. **Inventory Stock Update At:** When do you want to update stock count?
   default value: Order Completed

Note: All the **required values** are in bold in the **Order/Cart Settings** page.

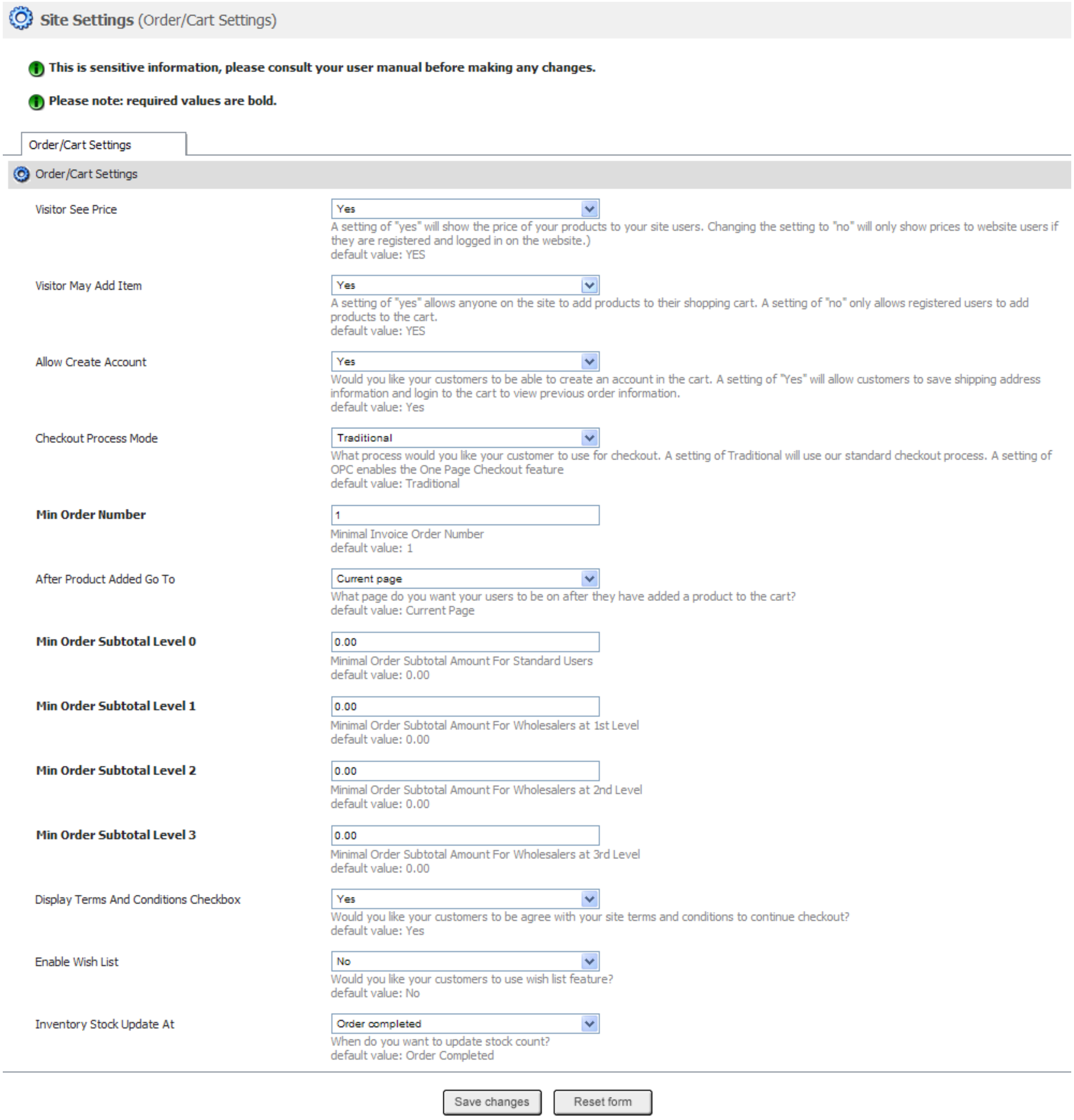


Figure 6-3-1: Order/Cart Settings Page

4. If you want to cancel or start again, click on **Reset form** button.
5. Click **Save changes** button to save details about **Order/Cart Settings**.

You can view the confirmation message on top of the **Order/Cart Settings** page, as shown in the Figure 6-3-2 below.

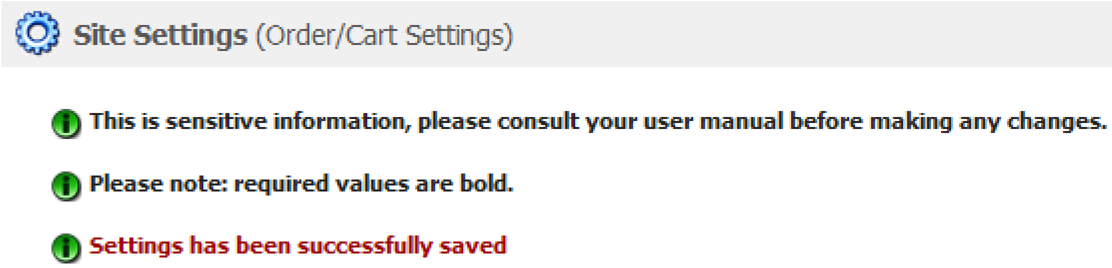


Figure 6-3-2: Save Confirmation

6.1.4 Security Settings

This section is used to manage the following information: Cookie Prefix, User Session Timeout, Order Timeout, Account Blocking on failed payment transactions, Number of hours Account is Blocked, Number of time Account Access can fail before access is denied, etc.

To go to **security settings** page, follow the steps:

1. Open 108 the **Global Cart Settings** page.
2. Click **Security Settings**.

The **Security Settings** page will open, as shown in the Figure 6-4-1 117 below.

3. **Security Settings:** Enter the following information:
   a. **Security Mode:** Select **Complete** security mode from the drop down menu, if you would like to make checkout pages secure, otherwise select **Standard** security mode. By default, this is **Standard**.
   b. **Security Cookies Prefix:** Enter the prefix the system will use for cookies. By default, this is **CartUserCookie**.
   c. **Security User Cookie Timeout:** Enter the number, in seconds, in the user session, after which a user is logged (timed) out for remaining inactive. By default, this time is **36000 seconds**.
   d. **Security Order Cookie Timeout:** Enter the number of seconds on the Order Pages, before a user is logged (timed) out for inactivity. By default, this time is **36000 seconds**.
   e. **Security Account Blocking:** This determines if a user will be blocked for a failed payment attempt or not. If you leave the default option, which is **Yes**, the user will be blocked if a payment attempt fails and selecting **No** will allow the user not to be blocked if a payment attempt fails.
   f. **Security Account Blocking Attempts:** Enter the number of times a user can attempt payment before being blocked, if Security Account Blocking is selected **Yes** in **Security Account Blocking**. By default, the Security Account Blocking Attempts is **3**.
   g. **Security Account Blocking Hours:** Enter the number of hours you wish a user to be blocked after a failed payment attempt. By default, this time is **24 hours**.
   h. **Security Display Clean Payment Page:** This determines when HTTPS protocol is enabled, it will display clean HTML payment page or

not. If you leave the default option, which is **Yes**, it will display clean HTML payment page and selecting **No** will not display clean HTML payment page.

i. **Security Admin Time Out:** Enter the number, in minutes, in the administrator session, after which an admin is logged (timed) out for remaining inactive. By default, this time is **15 minutes**.

j. **Security Inactive Account Notice:** Enable Inactive Account Notice for super administrators. Your choices are, to send it at login or using a cron job to set the timing of this notice.
default value: Using-Cron-Job

k. **Security Change Password Notification:** Enable Change Password Notification for super administrators. Your choices are, to send it at login or using a cron job to set the timing of this notice.
default value: Using-Cron-Job

Note: All the **required values** are in bold in the **Security Settings** page.

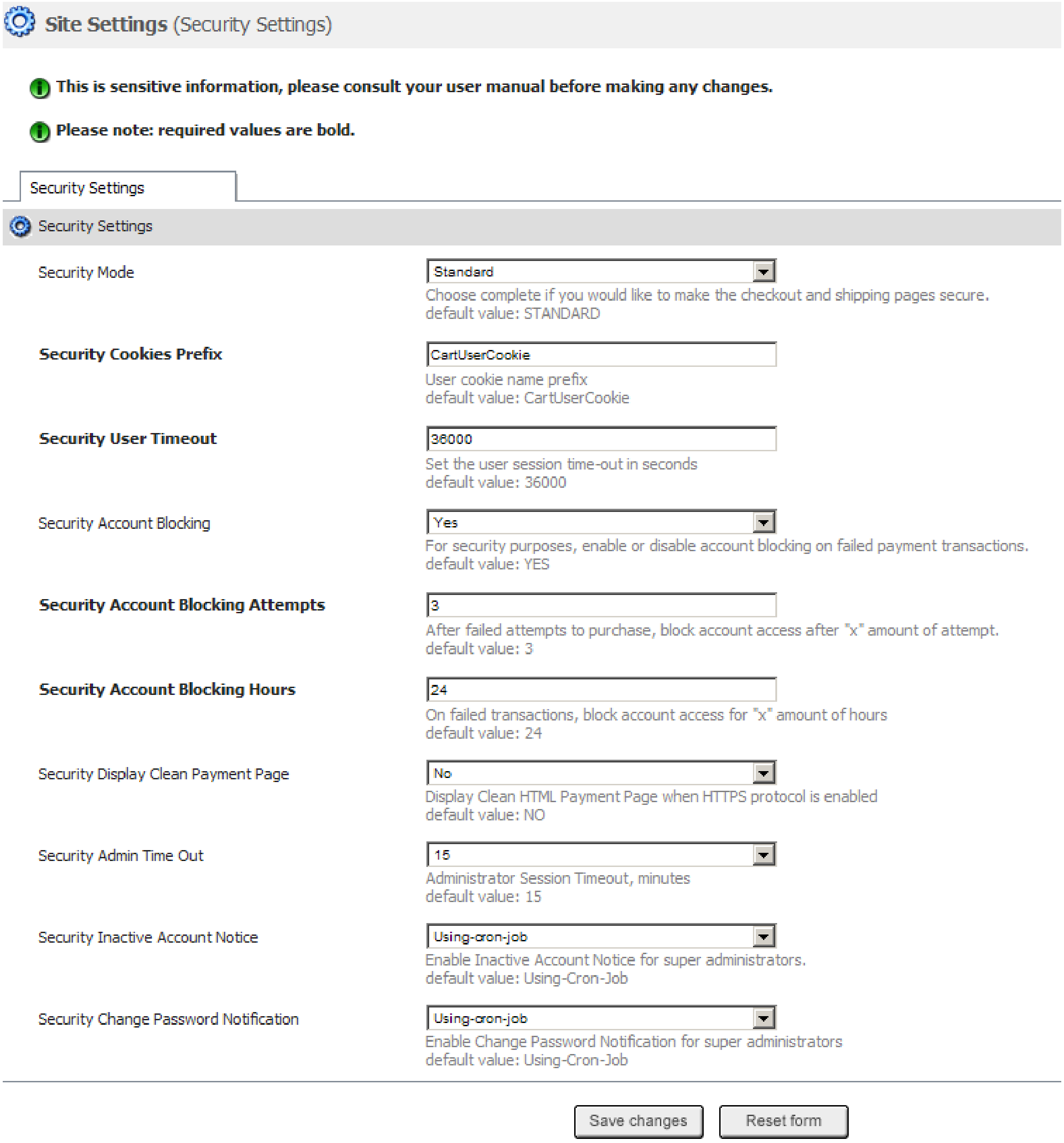


Figure 6-4-1: Security Settings Page

4. If you want to cancel or start again, click on **Reset form** button.
5. Click **Save changes** button to save details about **Security Settings**.

You can view the confirmation message on top of the **Security Settings** page, as shown in the Figure 6-4-2 below.

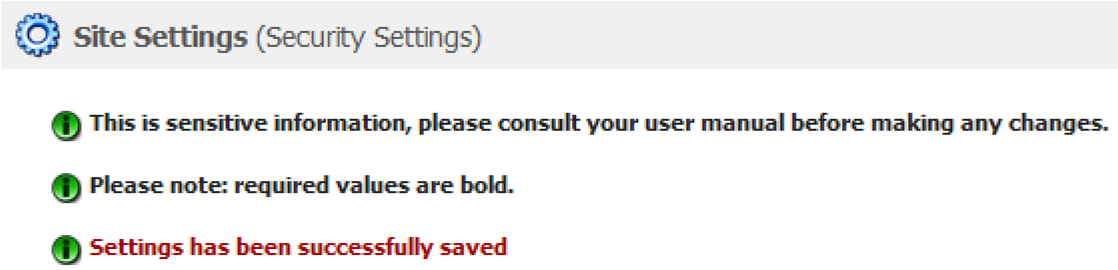


Figure 6-4-2: Save Confirmation

6.1.5 Bestsellers Settings

In this section, you can provide settings for your most popular products.

To go to **bestsellers settings** page, follow the steps:

1. Open the **Global Cart Settings** page.
2. Click **Bestsellers Settings**.

The **Bestsellers Settings** page will open, as shown in the Figure 6-5-1 below.

3. **Bestsellers Settings:** Enter the following information:
   a. **Catalog Best Sellers Available:** If you leave the default option, which is **Yes**, the Bestsellers Box will be displayed and select **No** if you don't want it.
   b. **Catalog Best Sellers Count:** Select the number of Bestsellers from the drop-down menu that are to be displayed in Bestsellers box. By default, the number is **7**.
   c. **Catalog Best Sellers Period:** This contains a listing of Bestsellers based on their sales value. To display names of Bestsellers listed for a period, say for example, 3 or 6 months or more, select the months or year from the drop down menu. By default, this is **2 months**.

Note: All the **required values** are in bold in the **Bestsellers Settings** page.

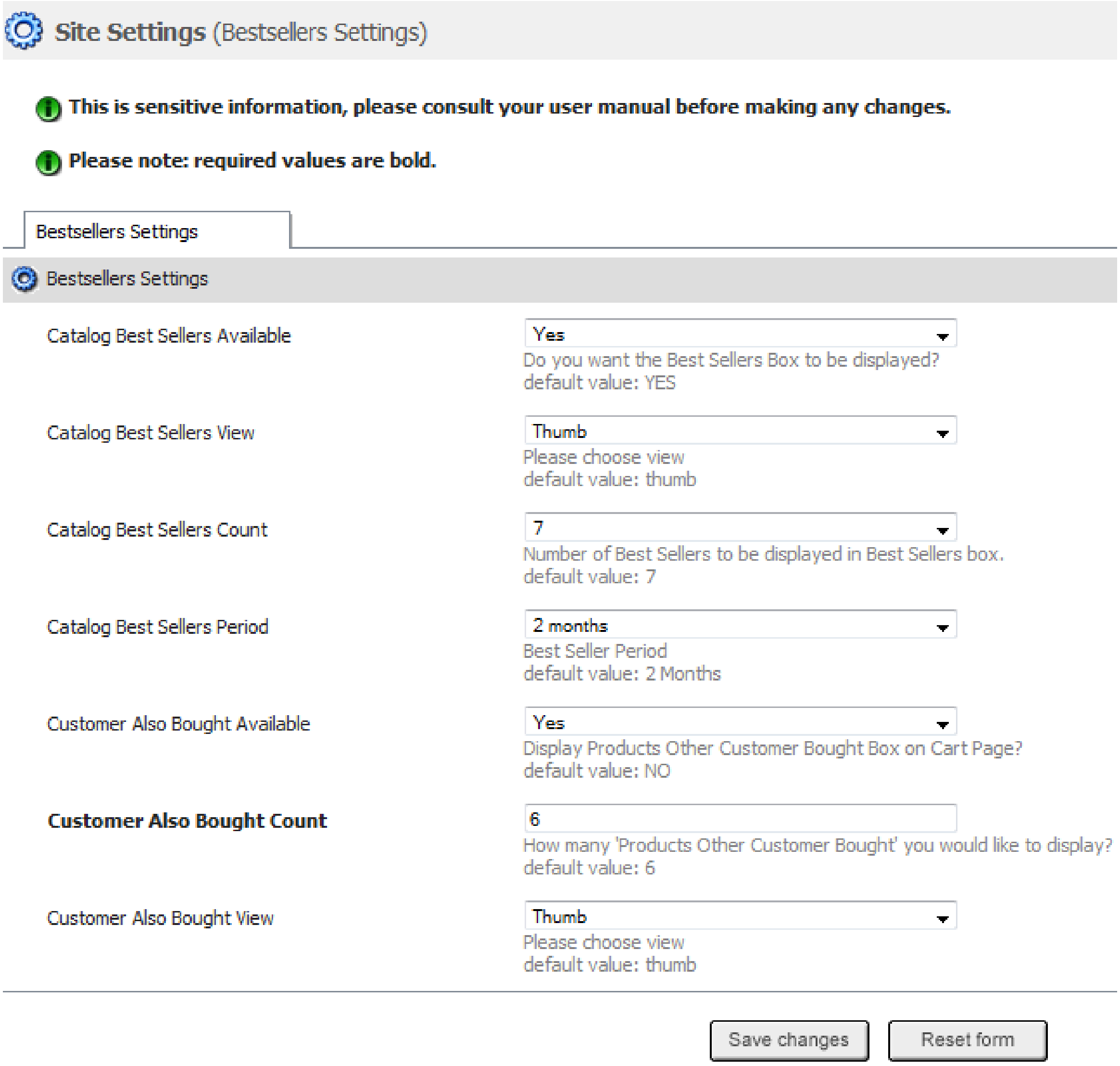


Figure 6-5-1: Bestsellers Settings Page

4. If you want to cancel or start again, click on the **Reset form** button.
5. Click **Save changes** button to save details about **Bestsellers Settings**.

You can view the confirmation message on top of the **Bestsellers Settings** page, as shown in the Figure 6-5-2 below.

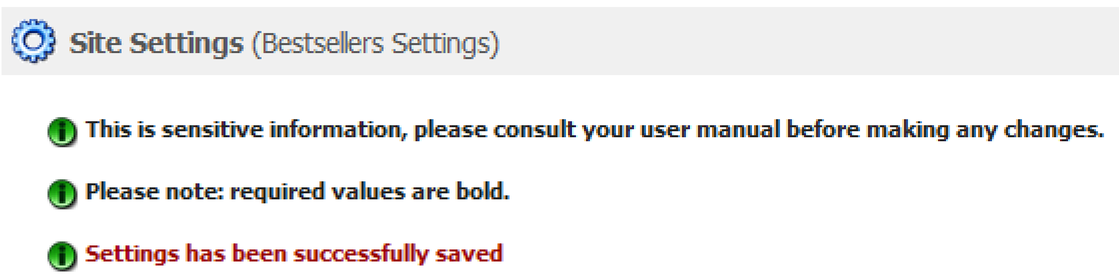


Figure 6-5-2: Save Confirmation

6.1.6 Proxy Settings

Proxy Settings

1. **Does your hosting provider require a proxy for CURL? :** Do not change this option unless you know for sure your hosting company requires the proxy. Set it to yes if it does.

2. **Please choose proxy server type :** Some hosting companies deviate from the standard usage of http for a proxy, if yours does, this is where you would change it. Currently the only other option is Socks5.

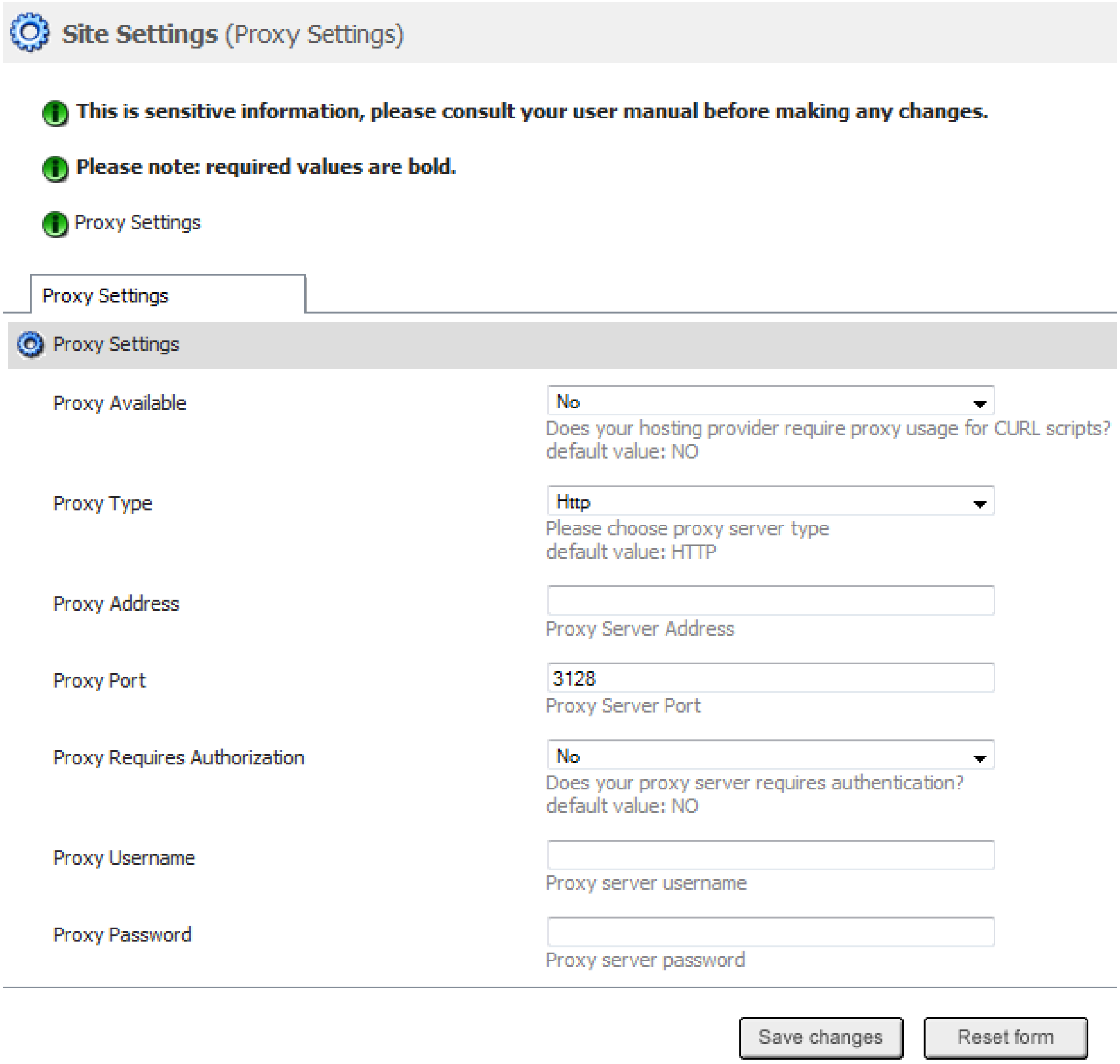
3. **Proxy Server Address :** Here is where you would put the full address of the proxy server that your hosting company has given you.

4. **Proxy Server Port :** Here is where you would put the port of the proxy server that your hosting company has given you.

5. **Does your proxy server require authentication? :** Normally this option is set to 'No', but is sometimes required by your host. If it is required, change the value to 'Yes'

6. **Proxy server username :** If your proxy server does require authentication this is where you would put the username.

7. **Proxy server password :** If your proxy server does require authentication this is where you would put the password.



6.1.7 Gift Message

This section allows you to enable or disable gift messaging and to set the maximum length of the gift message.

To go to **gift message** page, follow the steps:

1. Open 108 the **Global Cart Settings** page.
2. Click **Gift Message**.

The **Gift Message** page will open, as shown in the Figure 6-6-1 122 below.

3. **Gift Message:** Enter the following information:
   a. **Gift Card Active:** If you leave the default option, which is **No**, the gift card will be inactive and selecting **Yes** will make it active.

b. **Gift Card Message Length:** Enter the maximum length of the gift card message. By default, this is **225**.

Note: All the **required values** are in bold in the **Gift Message** page.

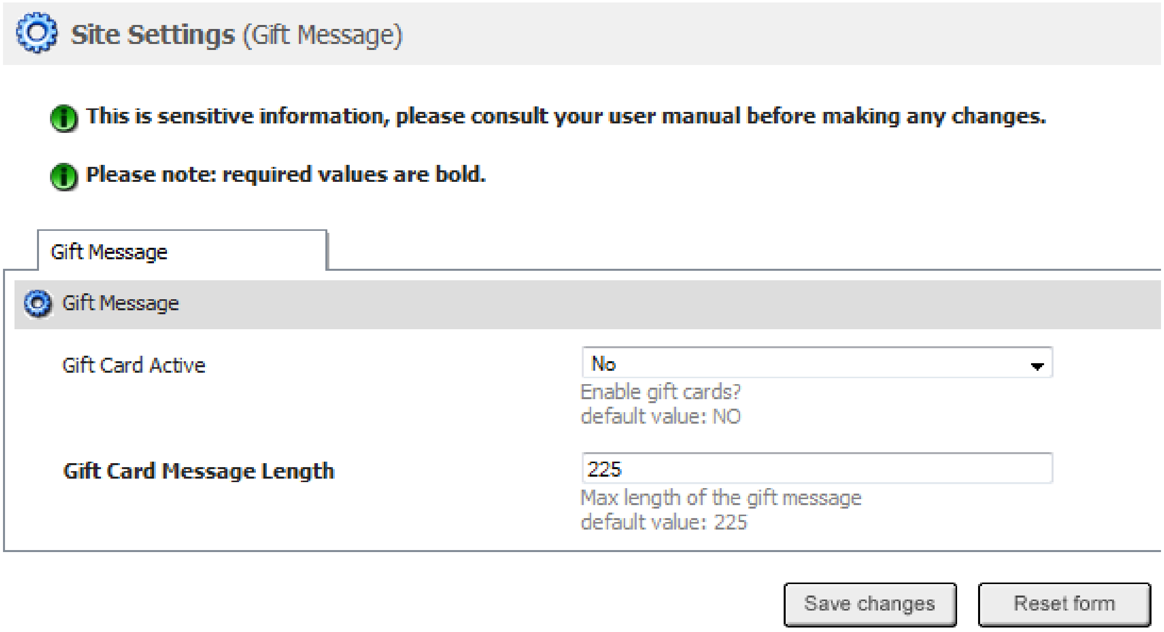


Figure 6-6-1: Gift Message Page

4. If you want to cancel or start again, click on the **Reset form** button.
5. Click **Save changes** button to save details about **Gift Message**.

You can view the confirmation message on top of the **Gift Message** page, as shown in the Figure 6-6-2 below.

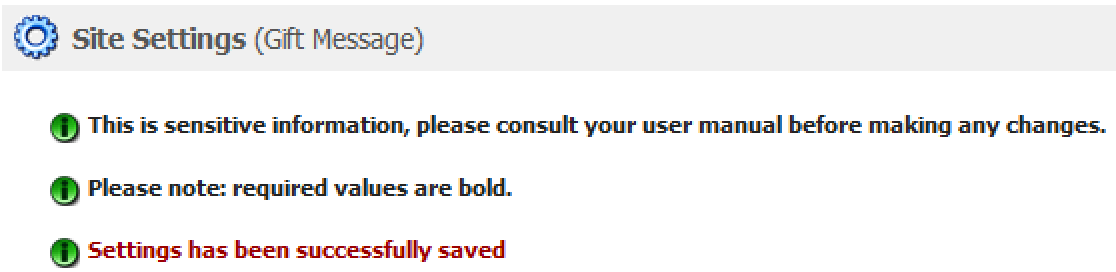


Figure 6-6-2: Save Confirmation

6.1.8 Digital Products

This section allows you to enable or disable Digital Produces and set download limit for downloading digital product.

To go to **digital products** page, follow the steps:

1. Open 108 the **Global Cart Settings** page.
2. Click **Digital Products**.

The **Digital Products** page will open, as shown in the Figure 6-7-1 123 below.

3. **Digital Products:** Enter the following information:
   a. **Digital Products Active:** Select **Yes** from the drop down menu to allow digital products and make it active. Selecting **No** will not allow digital products and make it inactive. By default, this is **No**.
   b. **Digital Products Download Limit:** Enter how many times a user can download digital product. By default, this is **10**.

Note: All the **required values** are in bold in the **Digital Products** page.

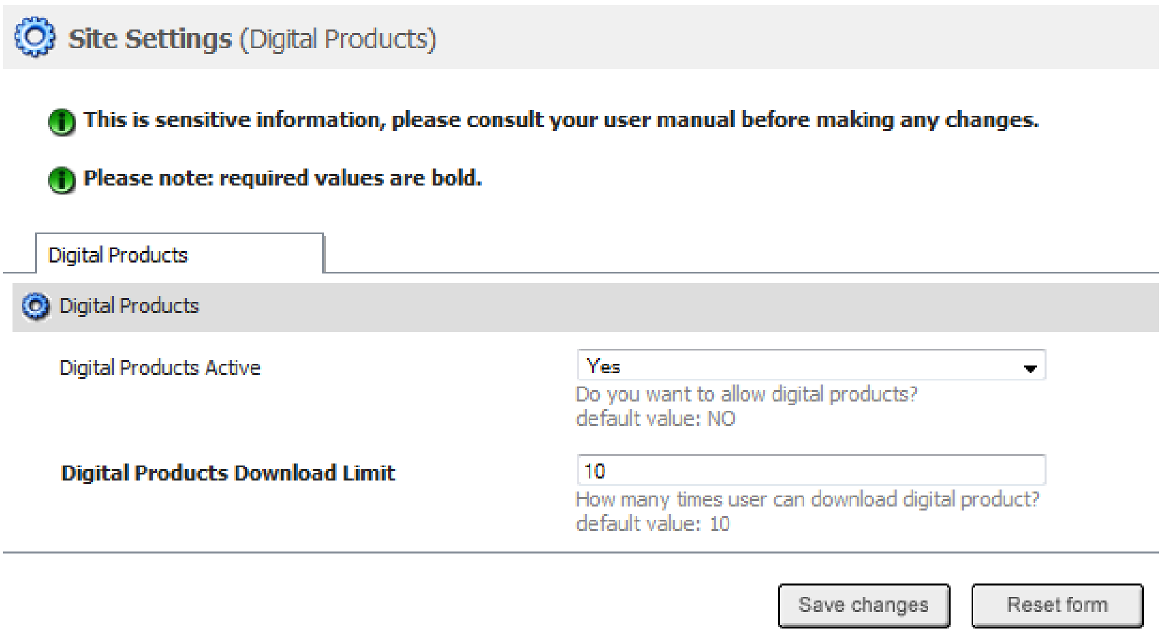


Figure 6-7-1: Digital Products Page

4. If you want to cancel or start again, click on **Reset form** button.
5. Click **Save changes** button to save details about **Digital Products**.

You can view the confirmation message on top of the **Digital Products** page, as shown in the Figure 6-7-2 below.

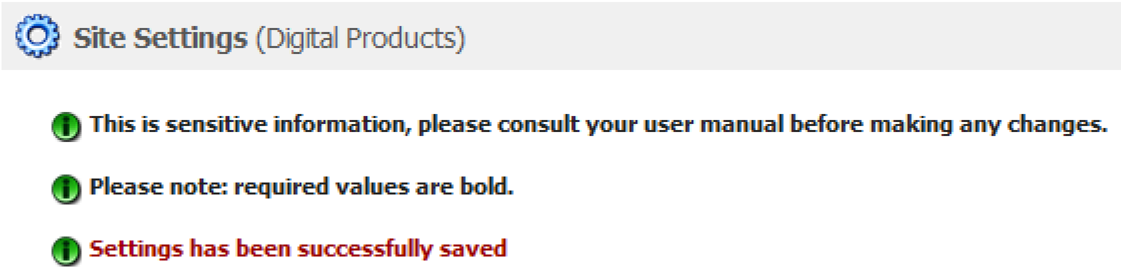


Figure 6-7-2: Save Confirmation

6.1.9 Printable Invoice Settings

This section allows you to set print invoice height and manage the company information for the printable invoice page.

To go to **Printable Invoice Settings** page, follow the steps:

1. Open 108 the **Global Cart Settings** page.
2. Click **Printable Invoice Settings**.

The **Printable Invoice Settings** page will open, as shown in the Figure 6-8-1 125 below.

3. In **Print Invoice Height**, enter the default height of invoice sheet (in pixels). By default, this is (**950 pixels**). This is the only mandatory field.
4. You can also select **Yes** from the drop-down menu for the **company information** (such as Company Name, Address, Phone, Logo Alignment, etc.) you want to add in the printable invoice page.

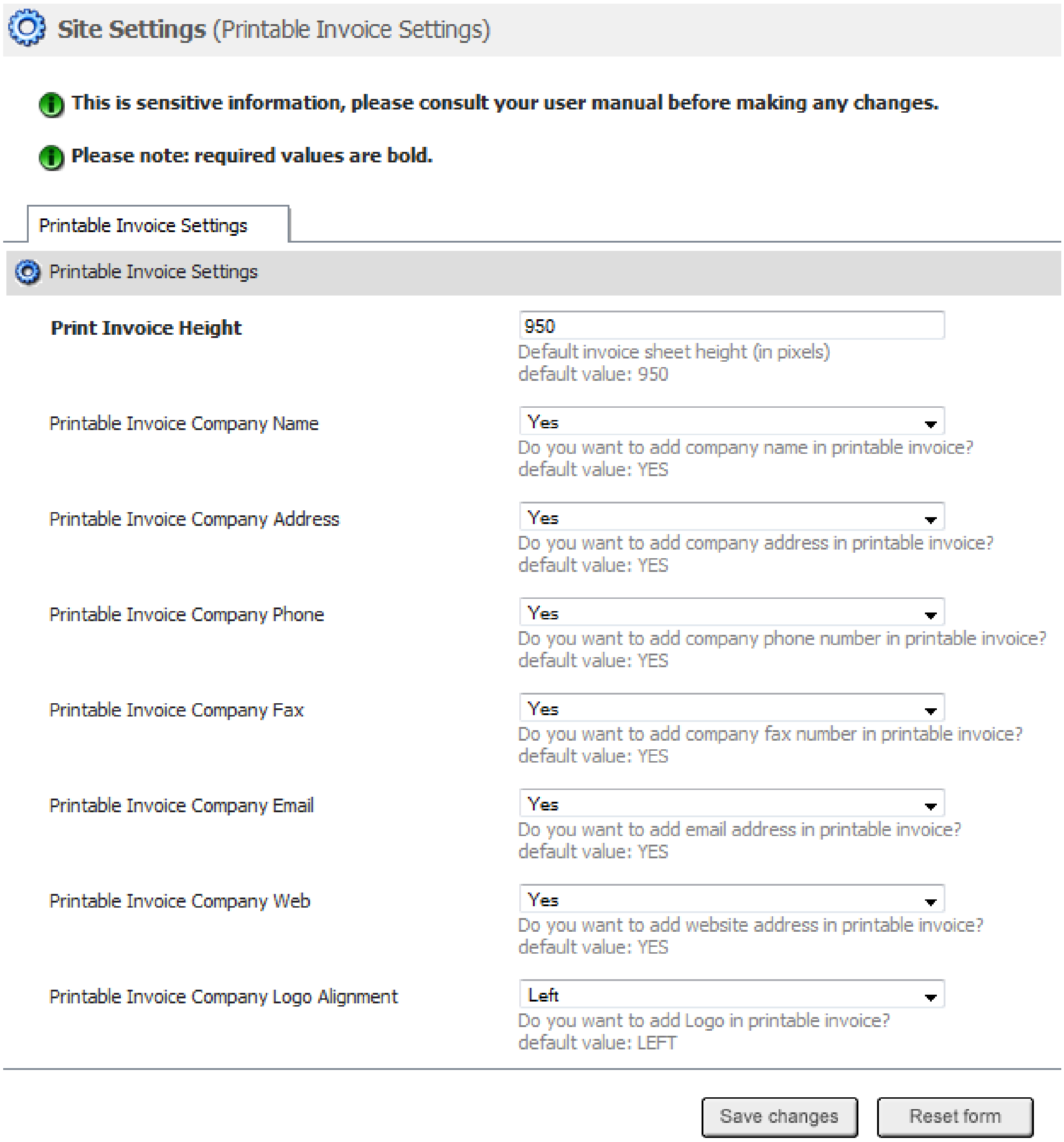


Figure 6-8-1: Printable Invoice Settings Page

5. If you want to cancel or start again, click on the **Reset form** button.
6. Click **Save changes** button to save details about **Printable Invoice Settings**.

You can view the confirmation message on top of the **Printable Invoice Settings** page, as shown in the Figure 6-8-2 below.

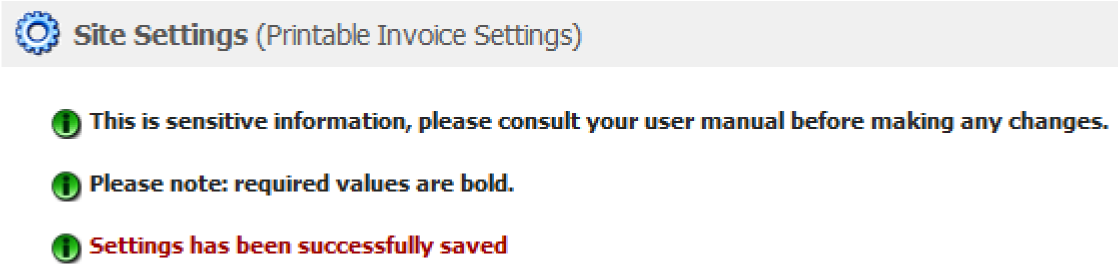


Figure 6-8-2: Save Confirmation

6.1.10 Search Engine Settings

This section is used to enter Search Engine information like Meta Keywords, Auto generation of additional keywords, and Use of URL Transformation for Products-Catalog & Text.

To go to the **search engine settings** page, follow the steps:

1. Open 108 the **Global Cart Settings** page.
2. Click **Search Engine Settings**.

The **Search Engine Settings** page will open, as shown in the Figure 6-9-1 127 below.

3. **Search Engine Settings:** Enter the following information:
   a. **Page (Site) Title:** Enter the Page (Site) Title you wish to use. It should not be more than 60 characters in length.
   b. **Allow Keywords Auto-Generation:** If you leave the default option, which is **Yes**, this will allow auto generation of additional keywords for your products, category and site pages and if **No** is selected from the drop down menu, auto generation of additional keywords for your products, category and site pages will not be allowed.
   c. **Generate Flat HTML URLs for catalog pages:** Select **Yes** from the drop down menu to generate Flat HTML URLs for catalog pages. Selecting **No** won't generate Flat HTML URLs for catalog pages. By default, this is **No**.
4. **Meta Keywords:** Enter the Meta Keywords that are to be used by search engines to direct users to your site. Separate all the keywords and phrases by comma (,). The length must be between 200 to 1000 characters.
5. **Meta Description:** Enter the Meta Description that is to be used by search engines to direct users to your site. The length must be between 6 to 125 characters.
6. **File "robots.txt":** You can create a robots.txt file that will be located in your main directory. This may help in search engine positioning.

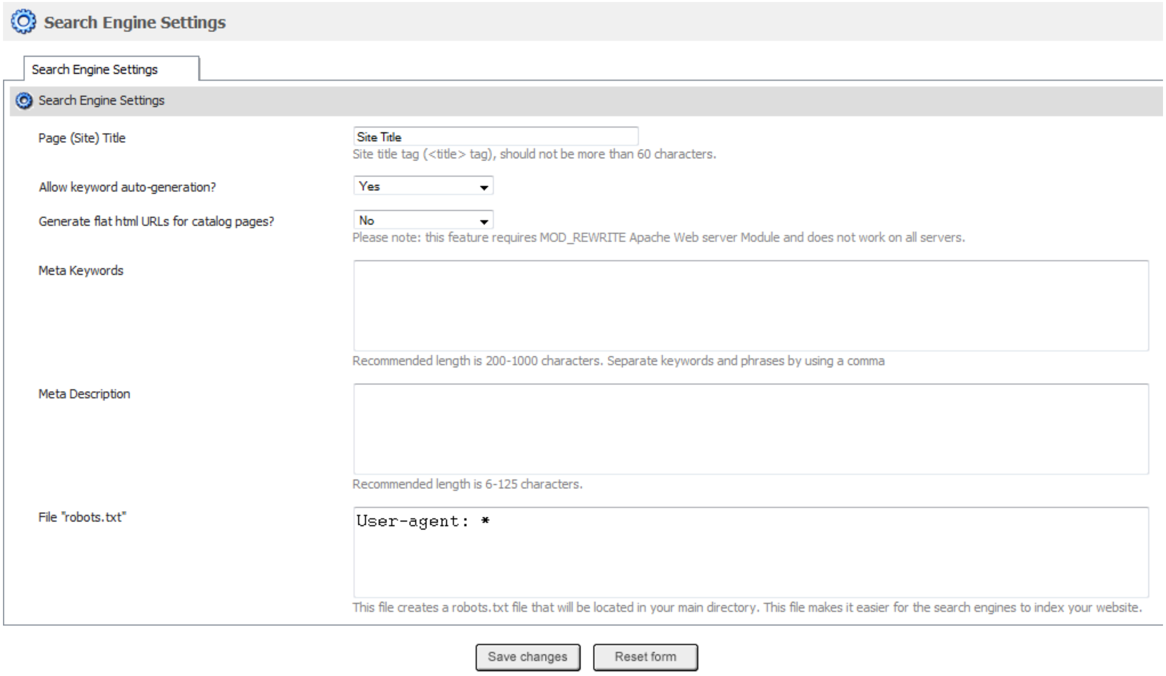


Figure 6-9-1: Search Engines Settings Page

7. If you want to cancel or start again, click on the **Reset form** button.
8. Click **Save changes** button to save details about **Search Engine Settings**.

6.1.11 Wholesale Settings

This section is used for Advanced Wholesales Support, and allows companies, who will wholesale, to apply Case Pack and Inter Pack fields to the Add a Product page. You can also add wholesale prices at product level globally. This information will also appear on the front end of your website.

To go to the **wholesale settings** page, follow the steps:

1. Open 108 the **Global Cart Settings** page.
2. Click **Wholesale Settings**.

The **Wholesale Settings** page will open.

3. **Wholesale Settings:** Enter the following information:
   a. **Activate wholesaler discounts at:** Select from the drop down menu, **I don't have wholesalers** if you don't have wholesalers, **Add discounts at product level** to enter wholesale prices for each products or **Calculate discounts globally** to automatically adjust wholesale prices on the basis of percentage discounts you provide in Wholesale Global Discounts 128 below.

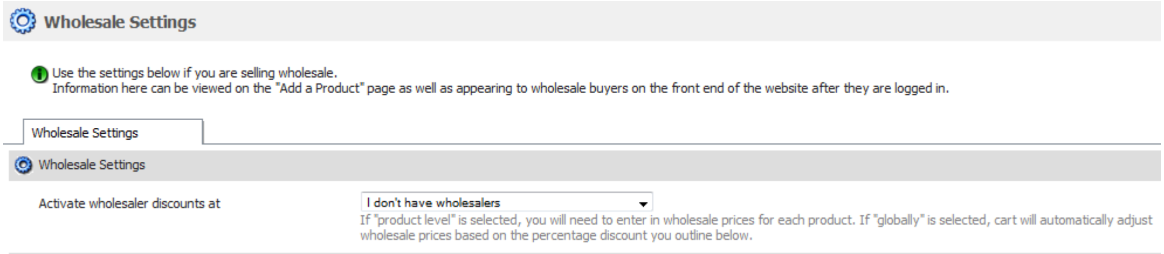


Figure 6-10-1: Wholesale Settings

4. **Wholesale Global Discounts:** Enter the following information:
   a. **How many wholesale levels do you have:** You can select up to 3 levels of wholesalers from the drop down menu.
   b. **Discounts Level:** Enter the percentage discounts for wholesale levels.

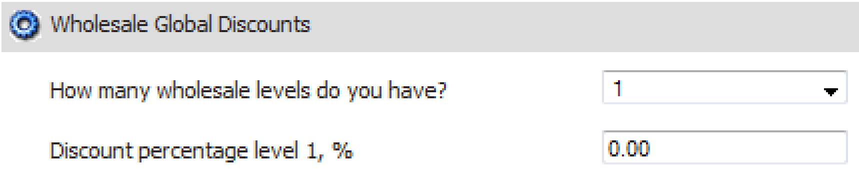


Figure 6-10-2: Wholesale Global Discounts

5. **Case Pack / Inter Pack Settings:** Enter the following information:
   a. **Allow Wholesale Case Pack:** Select **Yes** from the drop down menu to allow companies, who will wholesale, to apply Case Pack fields to the Add a Product Page, and select **No** if you don't want to Wholesale Case Pack.
   b. **Allow Wholesale Inter Pack:** Select **Yes** from the drop down menu to allow companies, who will wholesale, to apply Inter Pack fields to the Add a Product Page, and select **No** if you don't want to Wholesale Inter Pack.

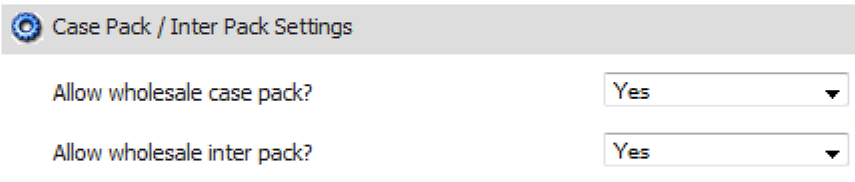


Figure 6-10-3: Case Pack / Inter Pack Settings

6. If you want to cancel or start again, click on **Reset form** button.
7. Click **Save changes** button to save details about **Wholesale Settings**.

6.1.12 Pop3 Email Settings

This section allows you to set up POP3 email account for managing bounced and bad email addresses and your smtp server settings for how the cart sends out emails.

To go to **POP3 and SMTP Email Settings** page, follow the steps:

1. Open 108 the **Global Cart Settings** page.
2. Click **Pop3 Email Settings**.

The **POP3 and SMTP Email Settings** page will open.

3. **POP3 protocol settings:** Enter the following information:
   a. **POP3 Server Name:** Enter the name of the POP3 Server.
   b. **POP3 Server Port:** Enter the POP3 Server Port.
   c. **POP3 Server Username:** Enter your POP3 Server Username.
   d. **POP3 Server Password:** Enter your POP3 Server Password.

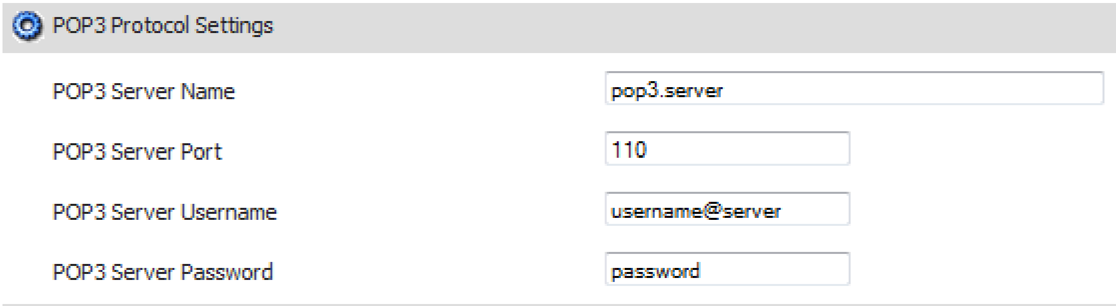


Figure 6-11-1: POP3 protocol settings

4. **Sendmail Engine settings:** Select how you want the cart to send out email notifications. Use php if your server allows you to send email the using php mail function, or use SMTP if you are going to use your SMTP server for sending the notification emails. <**contact your webhost to find out which they recommend using before setting this function**>

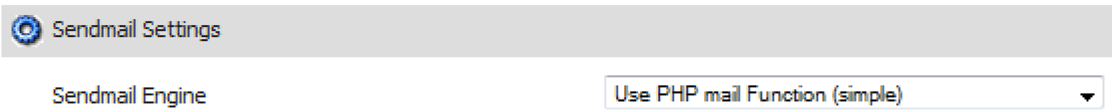


Figure 6-11-2: Sendmail Settings

5. **SMTP Server Settings:** This is the area where you would fill in your SMTP server settings if you selected the SMTP option as shown in figure 6-11-2.
   a. **Security Settings:** If your server uses SSL or TLS encryption please select that option here.
   b. **SMTP Server Name:** Enter the name of the SMTP Server.
   c. **SMTP Server Port:** Enter the SMTP Server Port.
   d. **SMTP Server Username:** Enter your SMTP Server Username.
   e. **Server Password:** Enter your SMTP Server Password.

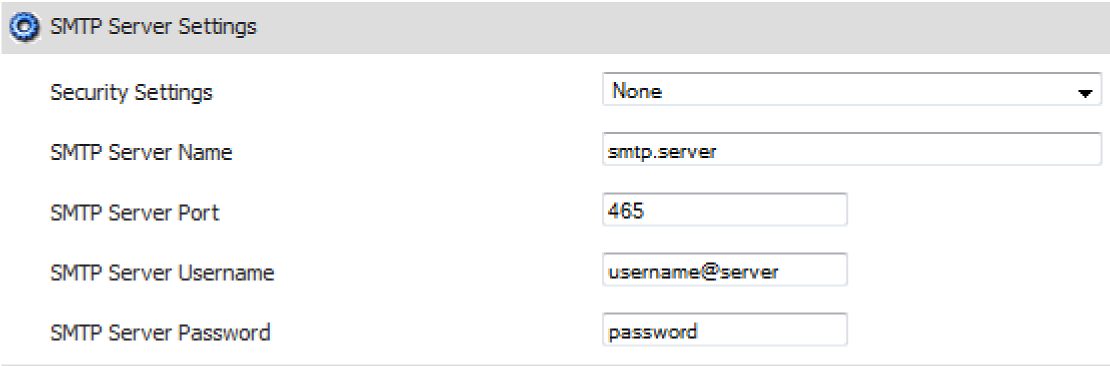


Figure 6-11-3: SMTP Server Settings

6. **Undeliverable email settings:** Enter the **number of fault delivery attempts** after which it will be decided that it is a **dead email**.

Note: Dead email means that the email address does not exist.

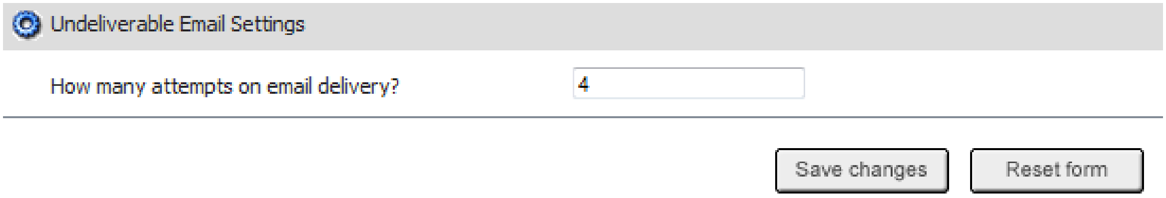


Figure 6-11-4: Undeliverable email settings

7. If you want to cancel or start again, click on the **Reset form** button.
8. Click **Save changes** button to save these settings.

6.1.13 Country List

Use this section to enable countries you sell your products. You can view all the enabled countries during the checkout process.

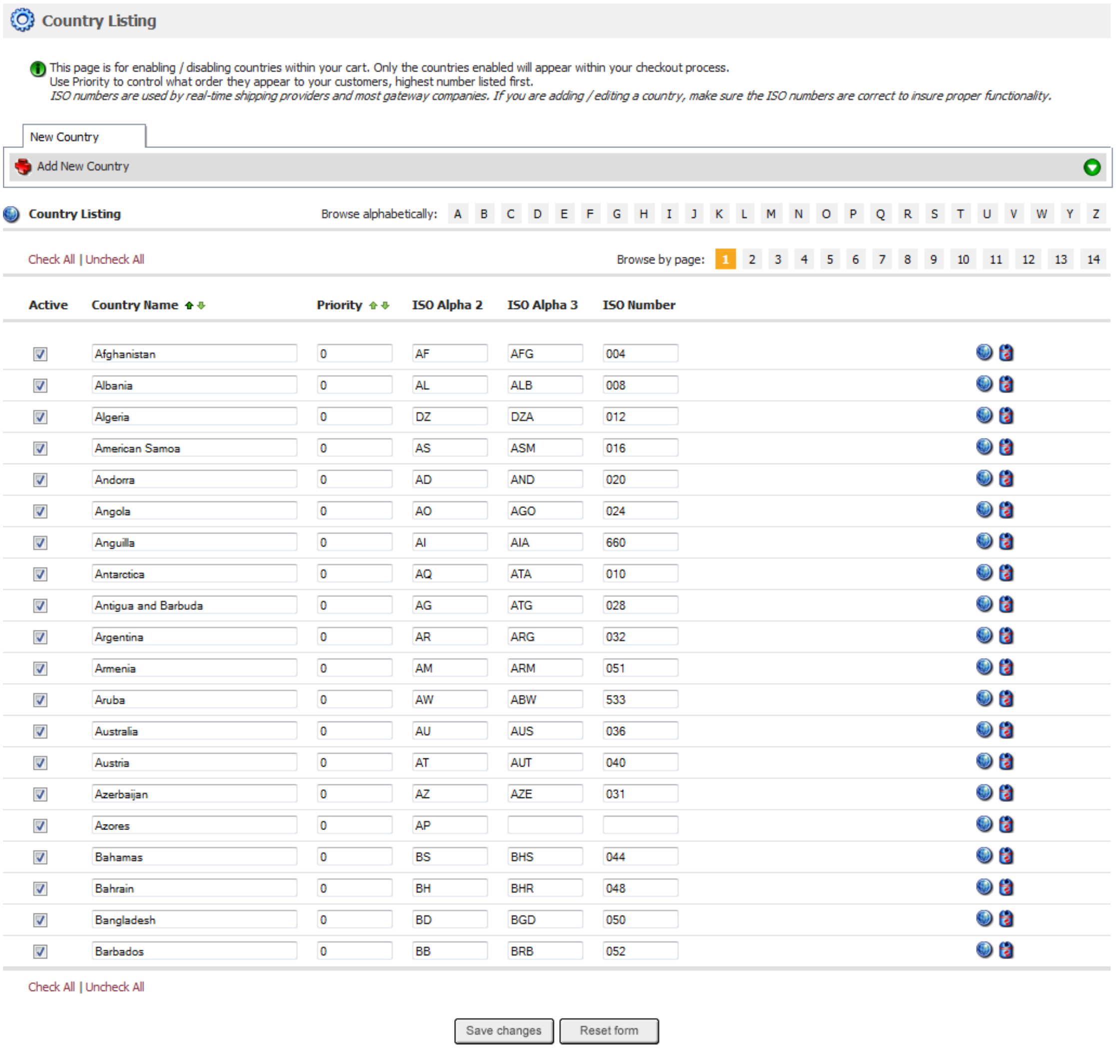
To go to **Country Listing** page, follow the steps:

1. Open 108 the **Global Cart Settings** page.
2. Click **Country List.**

The **Country Listing** page will open.

3. Here you select what countries you want to appear within the cart.
   a. **Active :** Use the check box to determine wether or not you want the country enabled/disabled.
   b. **Country Name:** Use the text field to edit or input the country name (i.e. Poland, Mexico, New Zealand).
   c. **Priority :** Use the text field to edit the priority of the country. You would use this feature if you wanted certain countries to appear before others in your drop down menus.
   d. **ISO Alpha 2 and 3 :** When editing or adding a new country to your

list, you need to make sure research what these are ahead of time as they need to be correctly filled out. If they are not, shipping gateways will not be able to recognize the country properly and give you inaccurate rates, if any at all.


Country Listing

This page is for enabling / disabling countries within your cart. Only the countries enabled will appear within your checkout process.
Use Priority to control what order they appear to your customers, highest number listed first.
ISO numbers are used by real-time shipping providers and most gateway companies. If you are adding / editing a country, make sure the ISO numbers are correct to insure proper functionality.

New Country

Add New Country

Country Listing   Browse alphabetically: A B C D E F G H I J K L M N O P Q R S T U V W Y Z

Check All | Uncheck All   Browse by page: 1 2 3 4 5 6 7 8 9 10 11 12 13 14

Active	Country Name	Priority	ISO Alpha 2	ISO Alpha 3	ISO Number
☑	Afghanistan	0	AF	AFG	004
☑	Albania	0	AL	ALB	008
☑	Algeria	0	DZ	DZA	012
☑	American Samoa	0	AS	ASM	016
☑	Andorra	0	AD	AND	020
☑	Angola	0	AO	AGO	024
☑	Anguilla	0	AI	AIA	660
☑	Antarctica	0	AQ	ATA	010
☑	Antigua and Barbuda	0	AG	ATG	028
☑	Argentina	0	AR	ARG	032
☑	Armenia	0	AM	ARM	051
☑	Aruba	0	AW	ABW	533
☑	Australia	0	AU	AUS	036
☑	Austria	0	AT	AUT	040
☑	Azerbaijan	0	AZ	AZE	031
☑	Azores	0	AP		
☑	Bahamas	0	BS	BHS	044
☑	Bahrain	0	BH	BHR	048
☑	Bangladesh	0	BD	BGD	050
☑	Barbados	0	BB	BRB	052

Check All | Uncheck All

Save changes   Reset form

Figure 6-12-1: Country Listing

4. By default, the only Countries to have all of their States/Provinces filled out are the US and Canada. If you are wanting to use another country you will need to fill out the States/Provinces listing for that country by clicking on the globe on the right, next to the recycle bin.
5. **Country Listing**
   a. **State / Province Name :** In this text field you can edit or add the name of the State or Province that correlates with the country you are editing. There are no spell checks for these fields so you will need to make sure that they spelling is correct.
   b. **Short Name (Code) :** In this text field can edit or add the shorthand version of the State or Province name. Usually it is only two letters.
6. Once you are done adding or editing the States/Provinces for the country you selected, hit save changes at the bottom.
7. Once you are done adding or editing your countries list, hit save

changes at the bottom.

6.1.14 Languages & Currencies Settings Overview

This section allows you to manage the Languages and Currencies, customize the cart to specific currencies and add a new language template to Springboard PromocartCart as well as manage (edit and delete) those language templates. To know in detail about the following sections, click on respective links below:

Local Settings 132
Currency 133
Language 136

6.1.14.1 Local Settings

You can use this section to manage the site local settings.

To go to **Languages and Currencies** page, follow the steps:

1. Open 108 the **Global Cart Settings** page.
2. Click **Languages & Currencies**.

The Site **Languages & Currencies** page will open under the **Local Settings** tab, as shown in the Figure 6-13-1 133 below.

Note: By default, the **Languages & Currencies** page opens under the **Local Settings** tab, as shown in the Figure 6-13-1 18 below.

3. **Local Settings:** Enter the following information:
   a. **Local Date/Time Format:** Enter the format to be used on your web site to display date and time. By default, this is **%m/%d/%Y - %r**.
   b. **Weight Unit:** Select the measurement unit for weight from the drop down menu, generally shipping weight (i.e. **Lbs** or **Kg**) used by your company. By default, this is **Lbs**.
   c. **Length Unit:** Select the measurement unit for length from the drop down menu (i.e. Feet, Inches or Centimeters) used by your company. By default, this is **Inches**.
   d. **Currency Decimal Symbol:** Enter the symbol, generally a decimal point (.) or a comma (,) that your company's currency uses to separate whole denominations (i.e. dollars) from partial denominations (i.e. cents). By default, this is (**.**).
   e. **Currency Thousands Separating Symbol:** Enter the thousands separating symbol. By default, this is (**,**).

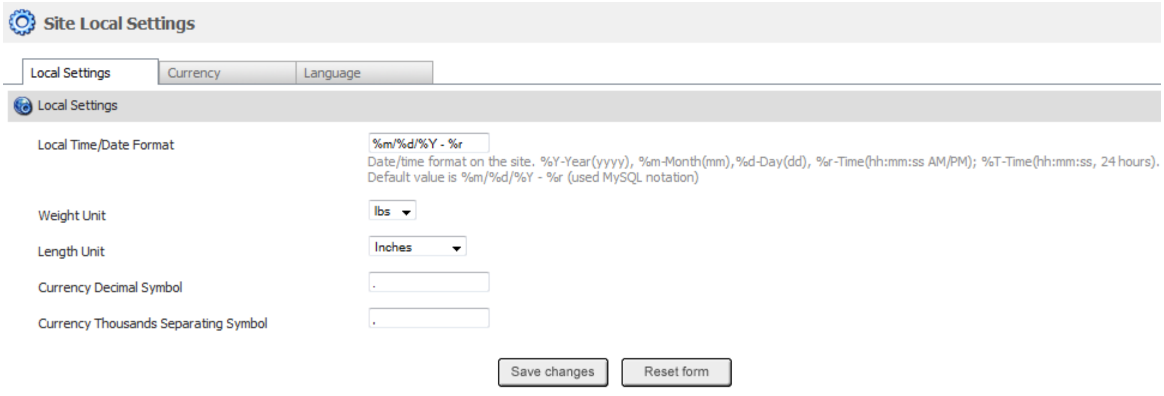


Figure 6-13-1: Site Local Settings Page

4. If you want to cancel or start again, click on **Reset form** button.
5. Click **Save changes** button to save details about **Local Settings**. You will get a confirmation message that the Local settings have been saved.

6.1.14.2 Currency Overview

You can use this section to customize the cart to specific currencies. You can add and manage (edit and delete) the existing currencies as well as new custom currencies. To know more about currencies, click on the links below.

Add New Currency 133
Edit 135
Delete 136

6.1.14.2.1 Add New Currency

You can use this section to create custom currency and then add the existing or custom currency to Springboard Promocart.

To add an existing currency to Springboard Promocart, follow the steps:

1. Open 132 the **Site Local Settings** page.
2. Click on the **Currency** tab on top of the page.

The **Currency** page opens, as shown in the Figure 6-14-1 below.

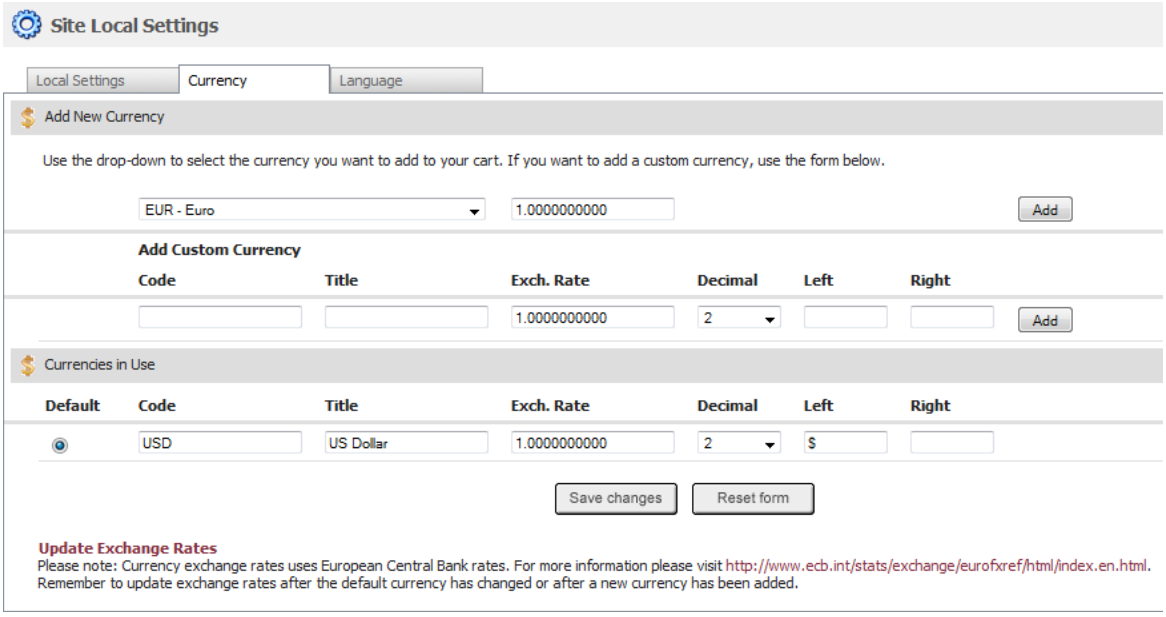


Figure 6-14-1: Currency page

3. Select an existing currency you want to add to Springboard Promocart from the drop-down menu, as shown in the Figure 6-14-1 134.

Note: You don't have to enter any details for an existing currency. Once added, the existing currency will automatically have all the information under Currencies in Use. Also, the exchange rate of an existing currency will be displayed with respect to the default currency.

4. Click **Add** button to add it to Springboard Promocart and view it under Currencies in Use 134 .

Note: You cannot delete the **Default currency** under **Currencies in Use** in Currency in use page 134. To make a currency default, select the radio-button of the currency under **Currencies in Use** and then click **Save changes** button.

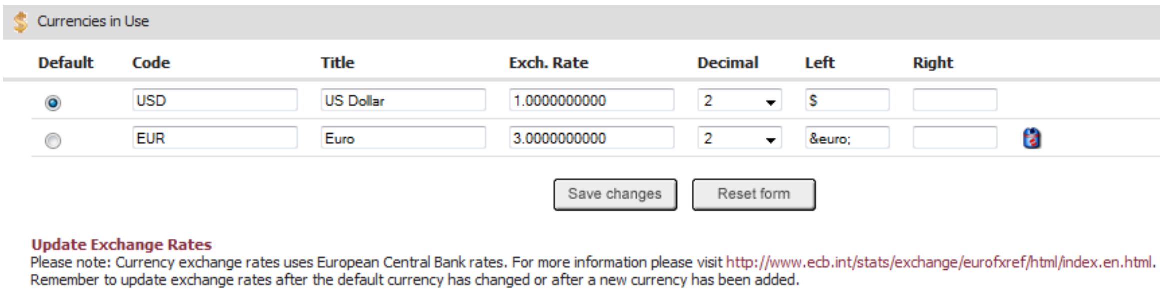


Figure 6-14-2: Currencies in Use

You can also create a custom currency from the **Currency** page and then add it to Springboard Promocart. To create a custom currency, scroll down to **Add Custom**

Currency under **Add New Currency** in [Currency in use page](134).

5. Enter the **Code**, **Title**, **Exch. Rate** and the Symbol (**Left** or **Right**) for the custom currency. Also, select the **Decimal** for the currency from the drop-down menu, as shown in the Figure 6-14-3 below.

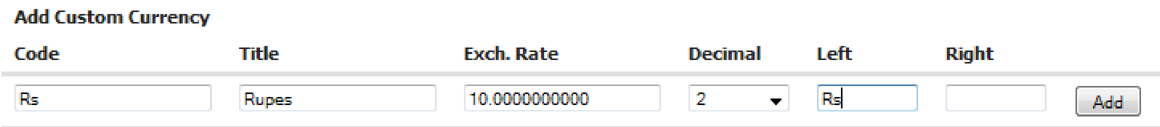


Figure 6-14-3: Add Custom Currency

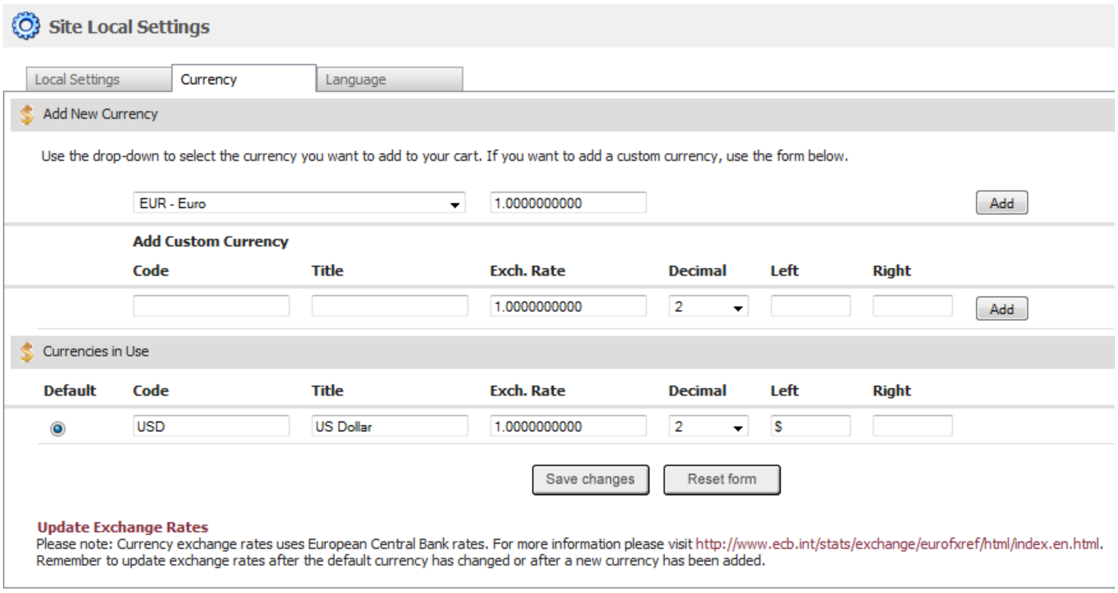
6. Click **Add** button to add it to Springboard Promocart and view it under **Currencies in Use**.

6.1.14.2.2 Edit Currency

You can use this section to edit the existing or custom currency of Springboard Promocart.

To edit an existing or custom currency of Springboard Promocart, follow the steps:

1. Scroll down to [Currencies in Use](134) on the [Currency page](134).
2. You can modify all the parameters for a currency under [Currencies in Use](134).



3. If you want to reset the form, click on the **Reset form** button.
4. Click **Save changes** button to update the information.

6.1.14.2.3 Delete Currency

You can use this section to delete the existing or custom currency of Springboard Promocart.

To delete an existing or custom currency of Springboard Promocart, follow the steps:

1. Scroll down to Currencies in Use 134 in Currency page 134.
2. Click **Delete** icon for a currency you want to remove.

A pop up appears asking for confirmation, as shown in the Figure 6-15-1 below.

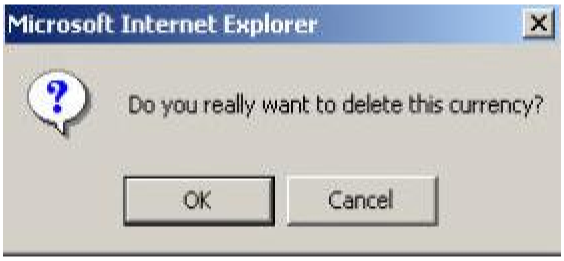


Figure 6-15-1: Delete Confirmation

3. Click **OK** button to remove it.

6.1.14.3 Language Overview

Use this section to select the language template you want to use on your site. You can add and manage (edit and delete) the language template. To know more about language template, click on the links below.

Add a Language 136
Edit 138
Delete 140

6.1.14.3.1 Add a Language

You can use this section to add a language template.

To add a language template, follow the steps:

1. Open 132 the **Site Local Settings** page.
2. Click on the **Language** tab on top of the page.

The **Language** page opens, as shown in the Figure 6-16-1 below.

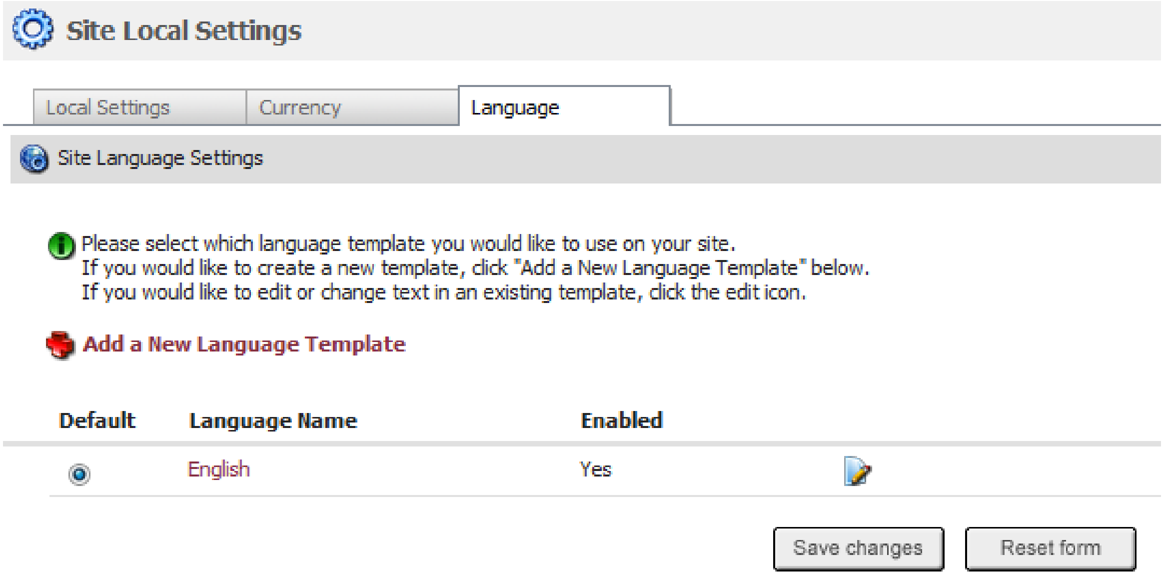


Figure 6-16-1: Language page

Note: You can set a language as an **active language** by clicking on the radio button and then clicking on the **Save changes** button.

3. Click **Add a New Language Template** link under **Language Settings** to open **Add / Create Language** page, as shown in the Figure 6-16-2 below.

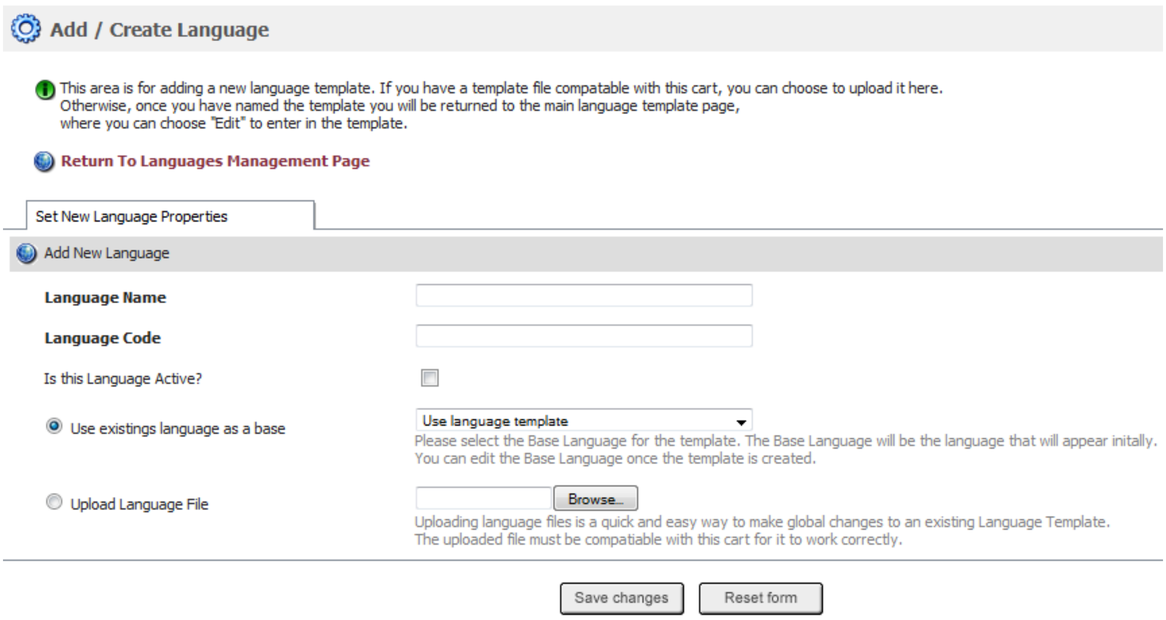


Figure 6-16-2: Add / Create Language page

4. Scroll down to **Add/ Create a New language** and enter the following information.
   a. **Language Name**: Enter the name of the Language.

b. **Language Code**: Enter the Language Code.
c. **Is this language active**: Check this Box to make the language you are adding as an active language for the site.
d. **Use existing language as a base**: Select the base language for the template from the drop-down menu.

Note: Base Language will be the language that will appear initially. You can edit the Base Language once the template is created.

e. **Upload language file:** Click on **Browse** to upload the language file from your local computer. The uploaded file must be compatible with this cart for it to work correctly.

5. If you want to reset the form, click on the **Reset form** button.
6. Click **Save changes** button to update the information.

You can view the confirmation message on top of the **Add / Create Language** page, as shown in the Figure 6–16-3 below.

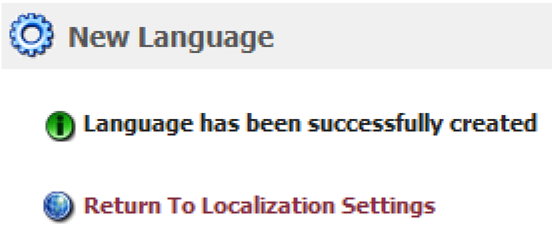


Figure 6-16-3: Language Confirmation Page

6.1.14.3.2 Edit Language

You can use this section to edit an existing language template. To know more about editing a language template, follow the steps below.

1. Open 136 the **Language** page.
2. Scroll down to **Language name** and click on **Edit** icon to edit an existing language template.

Update Language page opens.

Note: Click **Return To Main Languages Admin** link to return to Language page 137.

3. Edit the required Language settings under **Current Language**.

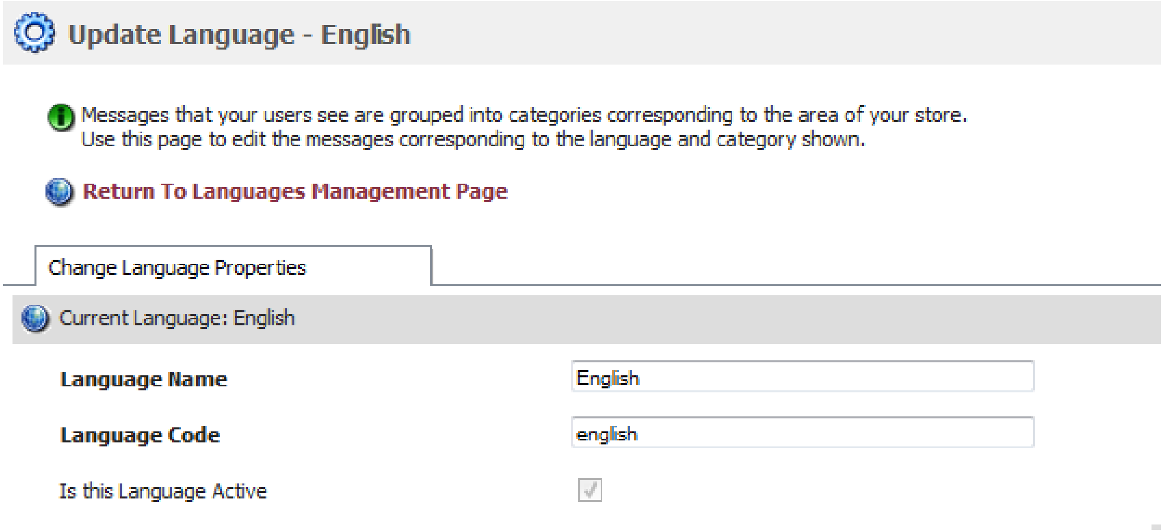


Figure 6-17-1: Current Language

4. You can also edit the messages under **Edit Messages Below**.

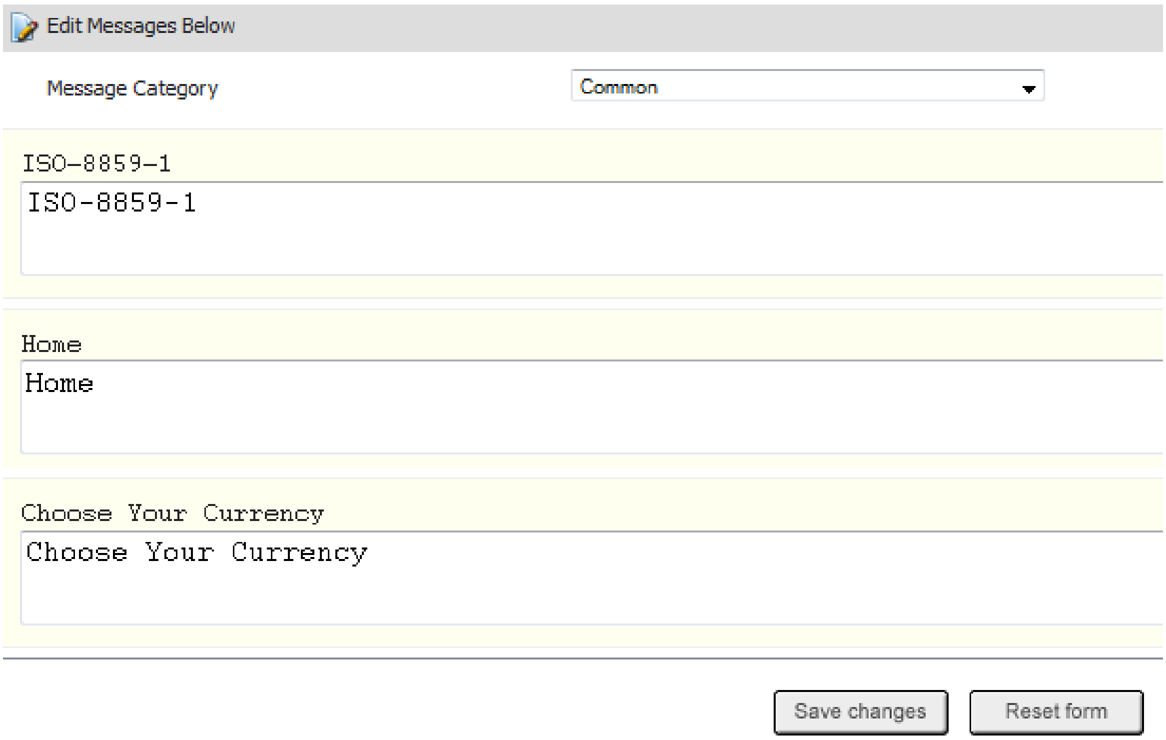


Figure 6-17-2: Edit Messages

5. If you want to reset the form, click on the **Reset form** button.
6. Click **Save changes** button to update the information.

6.1.14.3.3 Delete Language

You can use this section to delete an existing language template. To know more about deleting a language template, follow the steps below:

1. Open 136 the **Language** page.

2. Scroll down to **Language name** and click on **Delete** icon to delete an existing language template.

A pop up appears asking for confirmation, as shown in the Figure 6-18-1 below.

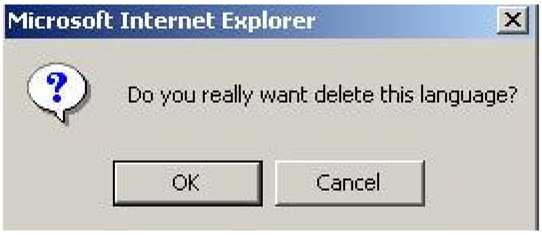


Figure 6-18-1: Delete Confirmation

3. Click **OK** to confirm deletion.

6.1.15 CCS Settings

Please Note

It's strongly recommend you do not store credit cards on your system unless you feel it is absolutely necessary.
No system is 100% safe and you will be held responsible for any breach in the security of your server.
CISP complaint payment gateways are the only recommend repository for customer payment information.
While we provide this feature as a service to our customers, we strongly advise against using it.
Since no encryption method is completely secure, we cannot be held responsible for any issues surrounding the storage of your customers payment data.

Entering in the information below will create a certificate

1. Make sure you enter in a password where prompted as shown below. <The password you enter will be used to view payment data on the order page.>.

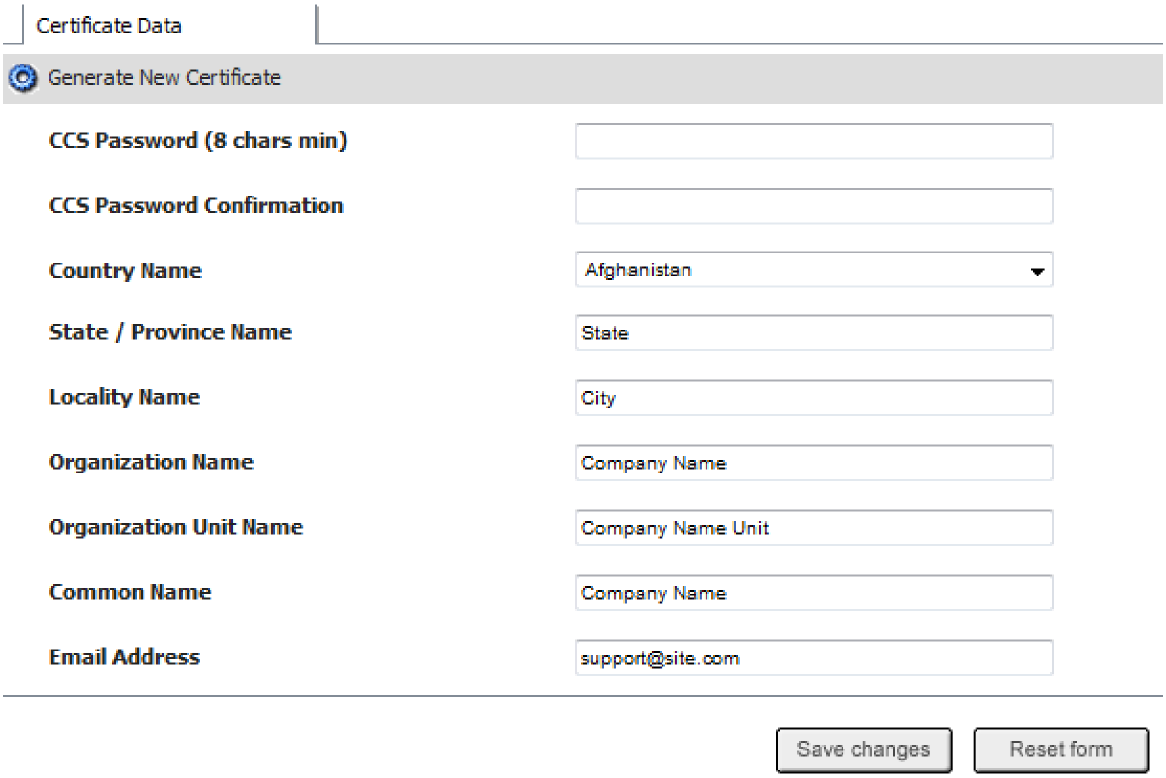
2. Fill in your Location and company information in the remaining fields.

3. Once completed the information below to generate a certificate for encrypting payment

information.

PLEASE READ

PLEASE NOTE - Any payment data encrypted with this certificate can only be accessed by the password you enter.
While you can generate a new certificate at anytime, you will not be able to access payment information encrypted with an older certificate.
Therefore, it is very important you do not lose this password. If lost, the only solution is to generate a new certificate.



6.2 Payment Methods

This section is used to manage the order settings (i.e. Realtime and Custom Payment method and Gateway). To know in detail about the following sections, click on respective links below:

Enable/Add Gateway 142

6.2.1 Enable/Add Gateway

You can use this section to create and select gateways you want to enable.

To **enable and add gateway** under **Realtime Processing - Payment with Credit Card** in **Payment Methods (Quick Setup)** page, follow the steps:

1. Click **Payment Methods**, as shown in the Figure 6-19-1 below.

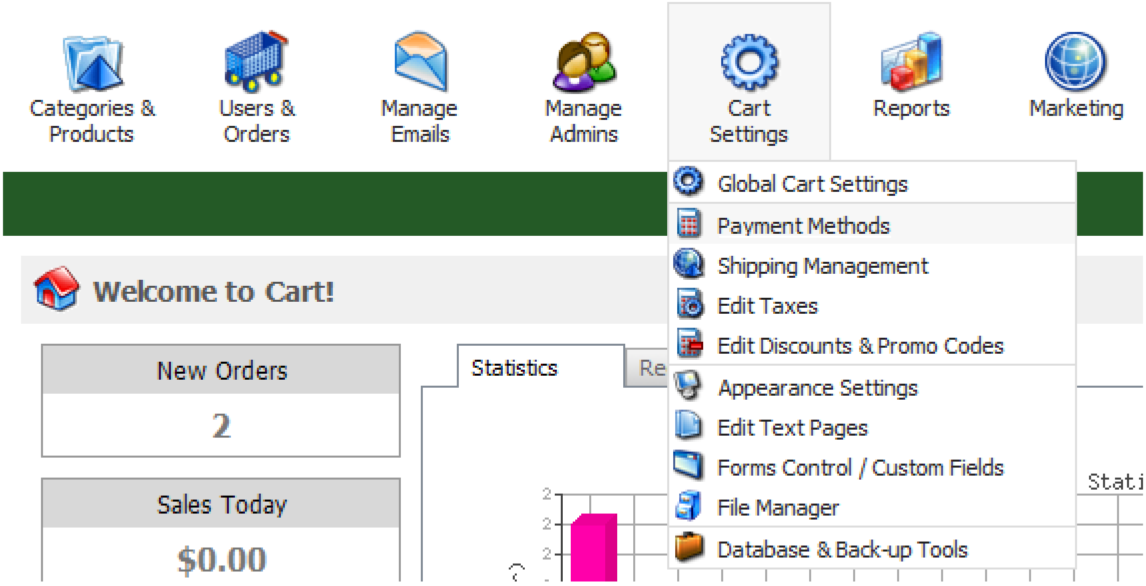


Figure 6-19-1: Payment Methods

Payment Methods (Quick Setup) page will open, as shown in the Figure 6-19-2 143 below.

Note: You can also open the **Payment Methods (Quick Setup)** page directly by clicking on **Payment Methods** link in the Admin Area Home page 8.

You can also edit 162 and disable 162 the **Realtime Payment Method** as well as add 163, edit 165 and delete 166 the **Custom Payment Method** from the **Payment Methods (Quick Setup)** page.

2. Scroll down to **Enable/Add Gateway**. Under **Enable/Add Gateway**, select a gateway from the drop down menu you want to enable/add.

Note: From **Payment Methods (Quick Setup)** page, you can **enable/add** any of these **Gateway** from the drop down menu (Authorize.Net, DataCash, Echo-inc.com,

FastTransact.com, iTransact.com, LinkPoint.com, NetBilling.com, NTPNow.com, PayPal Express Checkout, PayPal Pro, Protx.com, PsiGate.com, Shift4.com, VeriSign. Net, ViaKLIX, 2CheckOut.com, HSBC-CPI, PinnProcessing, Transaction Central, VeriSign.Net Pay Flow Link, WorldPay.com and Custom Payment Method).

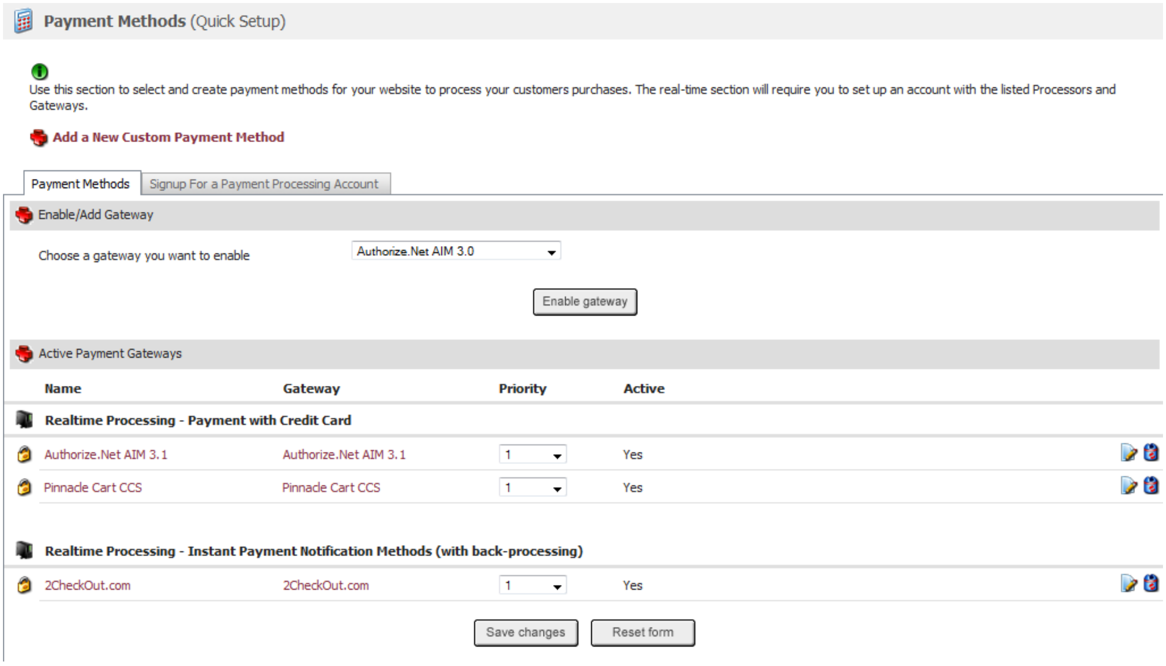


Figure 6-19-2: Payment Methods (Quick Setup) page

3. Click **Enable gateway** button to setup the selected payment gateway as shown in the Figure 6-19-3 below.

4. Click the  to edit any of the parameters of your active payment gateways, as shown in the Figure 6-19-3 below.

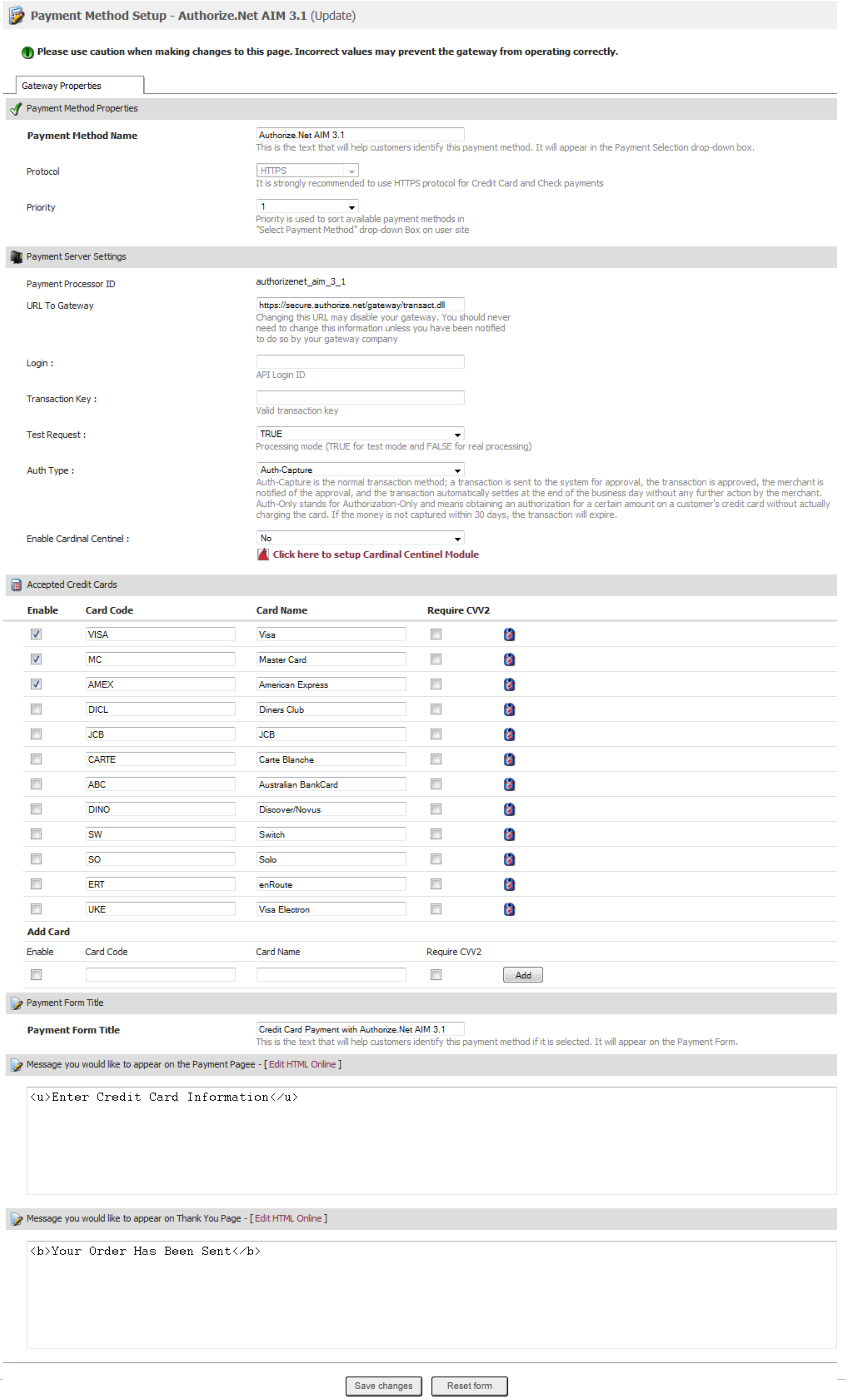

Payment Method Setup - Authorize.Net AIM 3.1 (Update)
Please use caution when making changes to this page. Incorrect values may prevent the gateway from operating correctly.
Gateway Properties
Payment Method Properties
Payment Method Name
Authorize.Net AIM 3.1
This is the text that will help customers identify this payment method. It will appear in the Payment Selection drop-down box.
Protocol
HTTPS
It is strongly recommended to use HTTPS protocol for Credit Card and Check payments
Priority
1
Priority is used to sort available payment methods in "Select Payment Method" drop-down Box on user site
Payment Server Settings
Payment Processor ID
authorizenet_aim_3_1
URL To Gateway
https://secure.authorize.net/gateway/transact.dll
Changing this URL may disable your gateway. You should never need to change this information unless you have been notified to do so by your gateway company
Login :
API Login ID
Transaction Key :
Valid transaction key
Test Request :
TRUE
Processing mode (TRUE for test mode and FALSE for real processing)
Auth Type :
Auth-Capture
Auth-Capture is the normal transaction method; a transaction is sent to the system for approval, the transaction is approved, the merchant is notified of the approval, and the transaction automatically settles at the end of the business day without any further action by the merchant. Auth-Only stands for Authorization-Only and means obtaining an authorization for a certain amount on a customer's credit card without actually charging the card. If the money is not captured within 30 days, the transaction will expire.
Enable Cardinal Centinel :
No
Click here to setup Cardinal Centinel Module
Accepted Credit Cards
Enable
Card Code
Card Name
Require CVV2
VISA
Visa
MC
Master Card
AMEX
American Express
DICL
Diners Club
JCB
JCB
CARTE
Carte Blanche
ABC
Australian BankCard
DINO
Discover/Novus
SW
Switch
SO
Solo
ERT
enRoute
UKE
Visa Electron
Add Card
Enable
Card Code
Card Name
Require CVV2
Add
Payment Form Title
Payment Form Title
Credit Card Payment with Authorize.Net AIM 3.1
This is the text that will help customers identify this payment method if it is selected. It will appear on the Payment Form.
Message you would like to appear on the Payment Pagee - [Edit HTML Online]
<u>Enter Credit Card Information</u>
Message you would like to appear on Thank You Page - [Edit HTML Online]
Your Order Has Been Sent
Save changes
Reset form

Figure 6-19-3: Payment Method (Update) page

4. If you want to cancel or start again, click on the **Reset form** button.
5. Click **Save changes** button to update the information and add the **gateway** under **Realtime Processing - Payment with Credit Card** in Payment Methods (Quick Setup) 143 **[****]** 143 page 143.

6.2.1.1 Setting Up 2CO Account (2checkout)

1. Go to **2checkout.com** and sign-up to become a seller.

2. Once your receive an e-mail confirming your are a seller on their system login to the 2checkout management area.

3. In the **"Helpful Links**" area, click to enter the **"Look & Feel"** area of the management system.

4. Under the area designated "Approved, pending and affiliate area" enter in the following information

• Direct Return drop-down box to "No"

• In the blank designated for "Approved URL" enter http(s)://www.yourcarturl.com/index.php?p=invoice&oa=ProcessPayment (be sure to replace http://www.yoursitename with the actual URL to your store)

• In the blank designated for "Pending URL" enter http(s)://www.yourcarturl.com/index.php?p=invoice (be sure to replace http://www.yoursitename with the actual URL to your store.)

Save your changes

5. Next login to your Springboard Promocart administration and go to Payment Methods 142 located under Cart Settings.

6. Activate the **2Checkou**t payment method

7. On the 2Checkout Payment screen, do the following

a. Set the Protocol to HTTP

b. Enter your **2checkout.com** store id in the blank labeled “sid”

c. If you are running a test enter “Y” into the blank labeled Demo or leave blank for live transactions.

8. Enter in the information you would like to have appear on your thank you pages.

9. Save your changes.

6.2.1.2 Setting up Authorize.Net AIM 3.1

Steps for setting up an **Authorize.net** account in the cart.

1. Get an **Authorize.net** account.
   Springboard Promocart uses the ADC Direct response method, Version : 3.1 (Simple Integration Method)

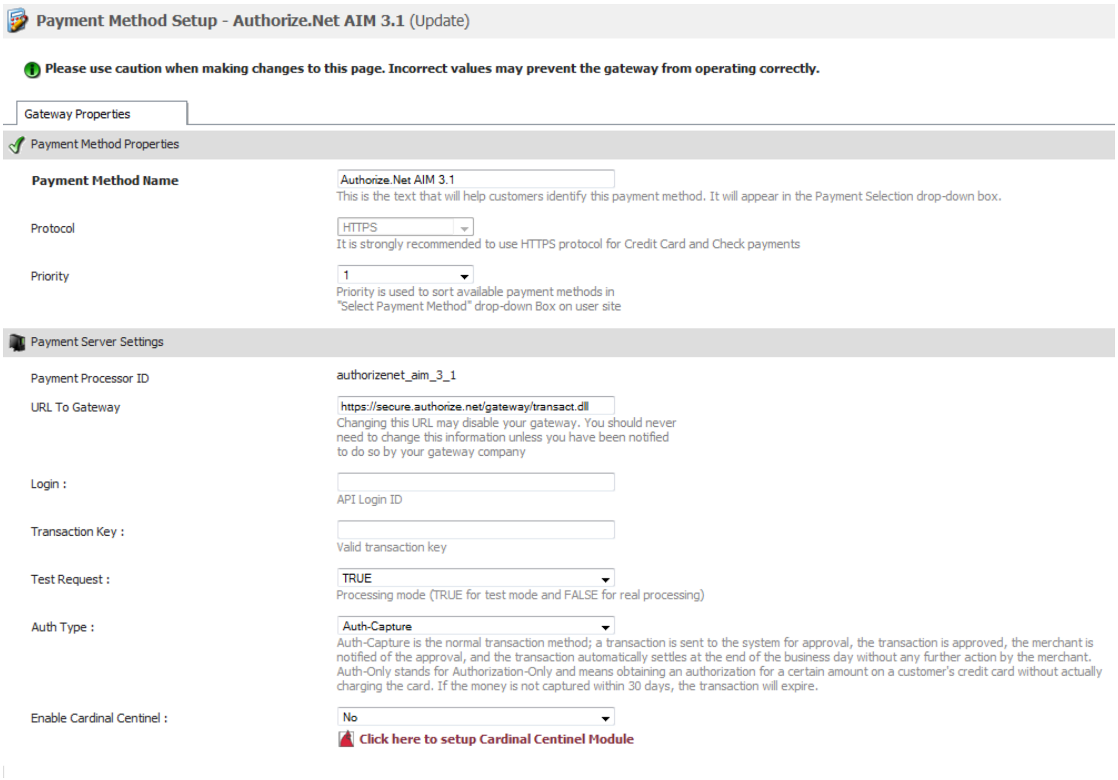
2. Login to your **Authorize.net** and go to Settings and Profiles area and look under the Security table. Specifically, make sure **Card Code Verification** and **Address Verification System (AVS)** are set as you would like them. These settings allow you to control security on your account and may help in preventing fraudulent transactions from being placed on Springboard Promocart.

3. Logout of **Authorize.net** and login to the Springboard Promocart Management area.

4. Go to Cart Settings >> Payment Methods and activate the Authorize 3.1.net gateway.

> **Important:** You will need to have an SSL (Security Certificate) set up to transfer credit card information securely to the gateway.

5. Enter in your Authorize.net Login (API Login) and Transaction Key.



6. **If you are going to run a test transaction, set Test Request to True**. Once testing is complete, make sure you set this back to False. Any of the following card numbers can be used to run test transactions. Please note that these numbers do not represent real card accounts; they will return a decline in live mode, and an approval in test mode. Any expiration dates after the current day's date can be used with these numbers.

370000000000002 - American Express
6011000000000012 - Discover
5424000000000015 - MasterCard
4007000000027 – Visa

7. Set Auth Type to **AUTH_CAPTURE** or **AUTH ONLY** depending on the how you would like Authorize.net to handle your transactions. (default is AUTH_CAPTURE)

8. Make sure your currency code is set to USD. At this time **Authorize.net** is only accepting transactions in US DOLLARS.

9. Enable the credit cards you have set up on the **Authorize.net** system. Do not enable credit cards that are not associated with your **Authorize.net** account, this will only cause confusion with your customers.

10. Enter in the messages you would like to appear on the both the payment and thank-you page.

11. Click save settings and log-out.

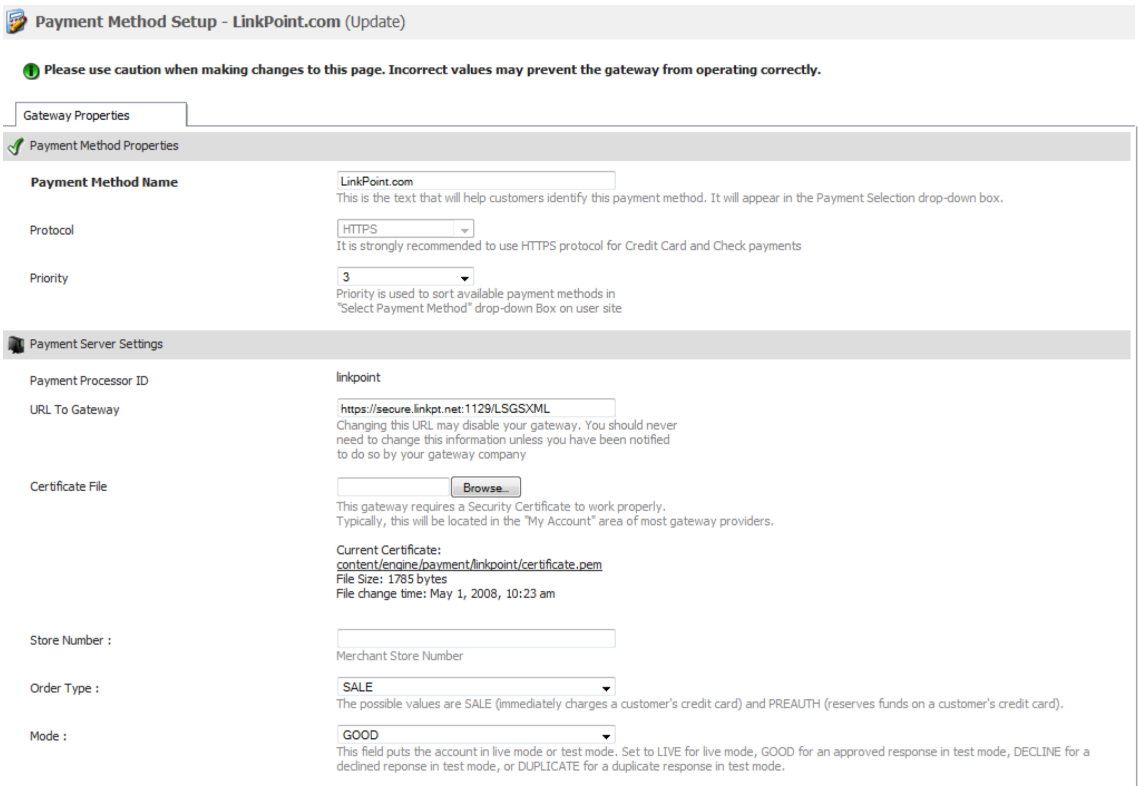
6.2.1.3 Setting Up Linkpoint.com

Important: The **LinkPoint.com** payment gateway requires a **digital certificate** to be uploaded to the cart for it to send and receive payment transaction data. This gateway will not work unless this certificate has been uploaded to the cart. When you activate this gateway you may notice a certificate is already present, this is simply an example certificate and it will need to be replaced with the certificate you receive from **LinkPoint.com**

The owner of the account should have received a welcome e-mail when the merchant account was opened. You must have a **LinkPoint API account** in order to receive this e-mail. If you lost this e-mail, you will have to call your merchant account provider to have the e-mail resent at 1-800 456-5989 x4100 (human interaction is a security requirement). At the very end of the message (embedded in the e-mail text) will be the digital certificate, which is your pem file. Follow the instructions given in the e-mail exactly to save the digital certificate into a file on your Web server with a .pem extension. Note the location (path) to the pem file.

`content/engine/payment/linkpoint/certificate.pem`

OR you can simply upload the certificate directly through the admin area within Springboard Promocart.



Additionally, you will need to set the protocol to **HTTPS** and have a SSL set up in Global

Site Settings 111 to use **Linkpoint.com.**

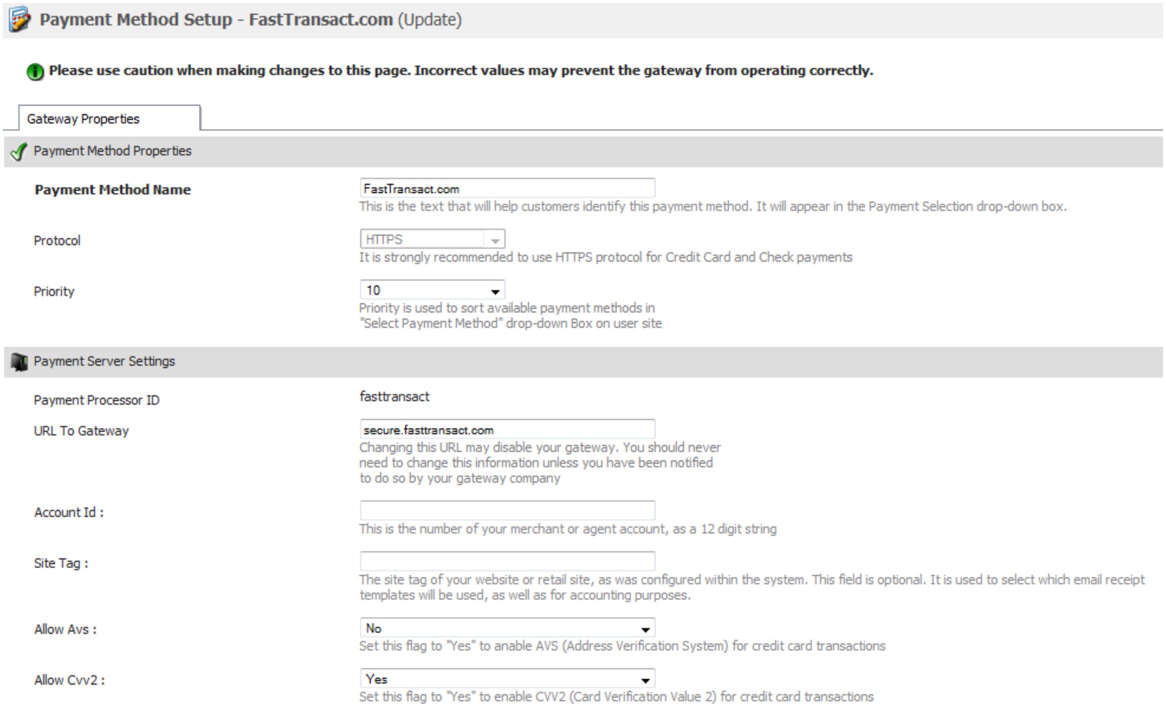
6.2.1.4 Setting Up PayPal Express Checkout

To enable Paypal Express Checkout scroll down to **'Enable/Add Gateway'**. Under **'Enable/Add Gateway'** select **'Paypal Express Checkout'**.

1. Upload your certificate to the server by clicking on the '**browse'** button under the '**Payment Server Settings'**.=

2. Your certificate should come from PayPal in the form of a **.pem** file.

3. Enter your PayPal Pro Username and Password



*Note: The username in the picture is not the one you want to you use, you want to use the one supplied to you by PayPal.

4. Decide on wether or not you want PayPal Express Checkout to be your only merchant option for customers in the **'Exclusive'** option.

5. Choose wether or not you are going to make this option **'Live'** or in **'Test'** mode on the **'Mode'** option.

6. And finally determine what kind of payment action you want to have live on Springboard Promocart: **'Sale'**, **'Authorization'**, or **'Order'** . The description for each option is located below the **'Payment Action'** field.

6.2.1.5 Setting Up PayPal Payments Pro

To use the **PayPal Payments Pro Gateway**, you will need an Payments Pro Gateway through PayPal.com. Once logged into PayPal.com you will see an option to set up a **PayPal Payments Pro Gateway**.

> PayPal's Payments Pro gateway differs from the traditional PayPal.com gateway in every transaction is completed on your website. So the customer doesn't have to be directed to Paypal.com to complete the transaction.

First you will need to apply for a Website Payments Pro account.

1. Return to your Business Account Overview page and click the Merchant Tools tab.
2. Under Website Payments Pro, click Learn More.
3. Under Getting Started, click Submit application.
4. Complete the application form and click Continue.
5. On the Application Approved page, click Getting started with PayPal.
6. Follow the link to accept the billing agreement.
7. You are taken to a page for API Setup.

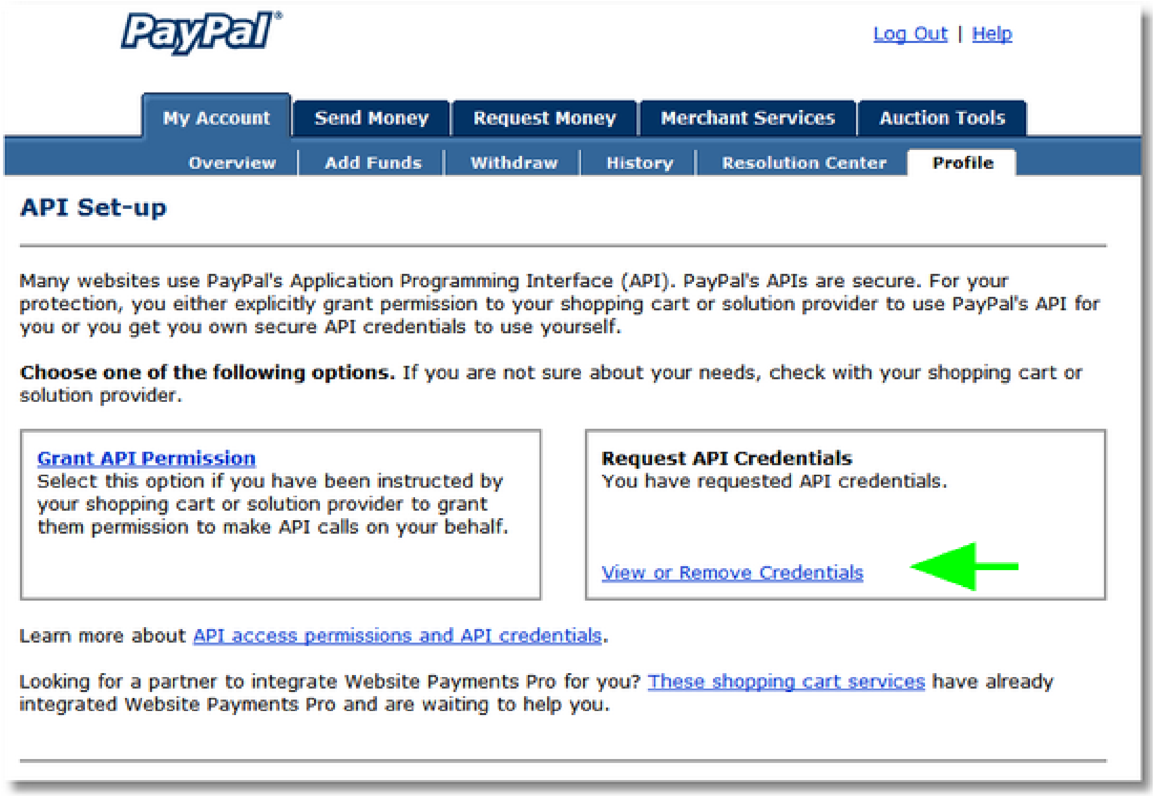
Next you will need to generate an API Certificate through PayPal.com to up be uploaded to the cart. This certificate is used by PayPal.com to identify Springboard Promocart.

Follow these steps to generate your API Certificate:

Once you have completed these steps, you can start the process of setting up PayPal though the back of the cart.

1. Login to PayPal and go to “Request API Credentials” and apply for the SSL Client-Side Certificate.
2. Next you will receive an e-mail form PayPal stating your API certificate is ready to use.

3. Login and click “View or Remove Credentials” under



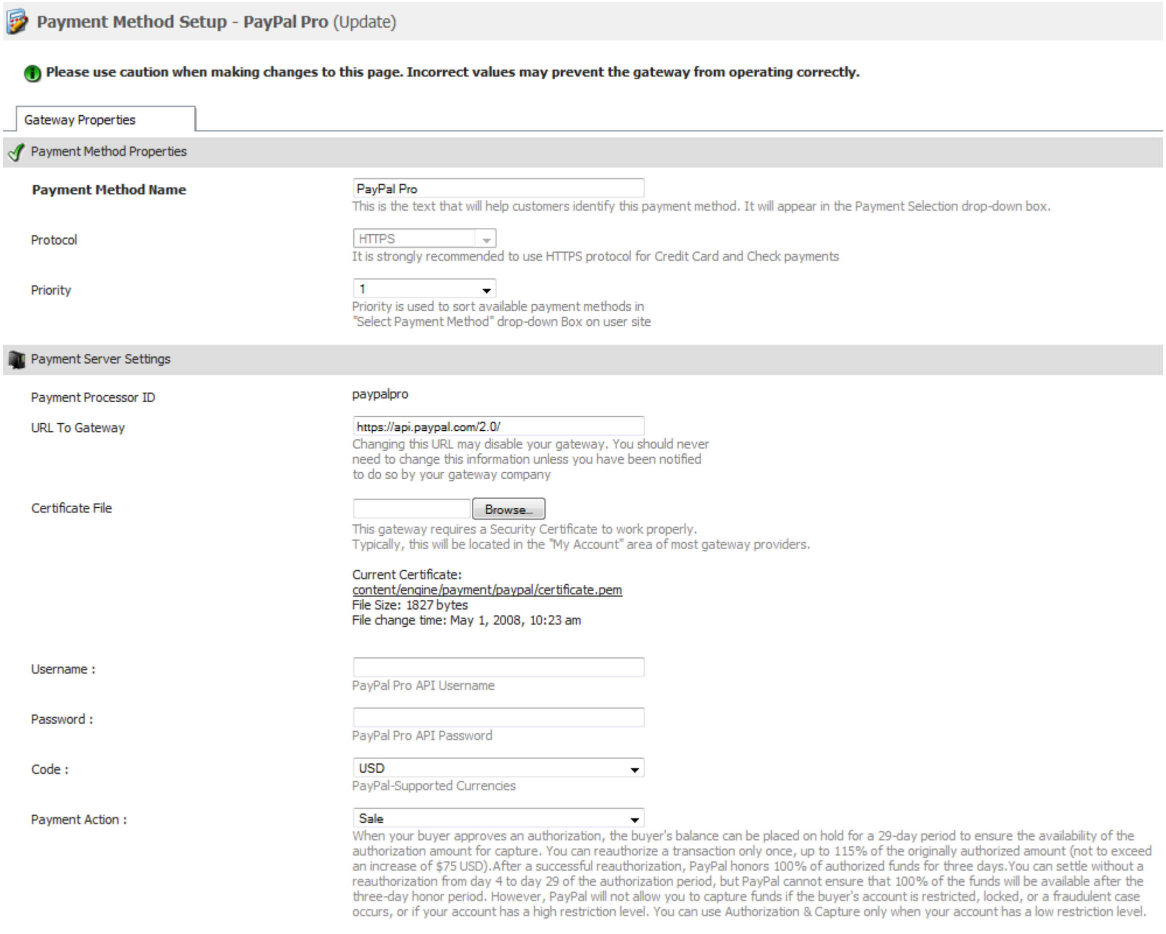
4. Next download your API certificate and save it to your computer. Also record your API username and API password.

5. Login to Springboard Promocart and activate PayPal Pro

6. Use the HTTPS protocol

7. Enter in your API Username and API Password into the cart. Your Paypal Username and Password will not work.

8. Upload your certificate to the server by clicking on the “browse” button under the Payment Server Settings.

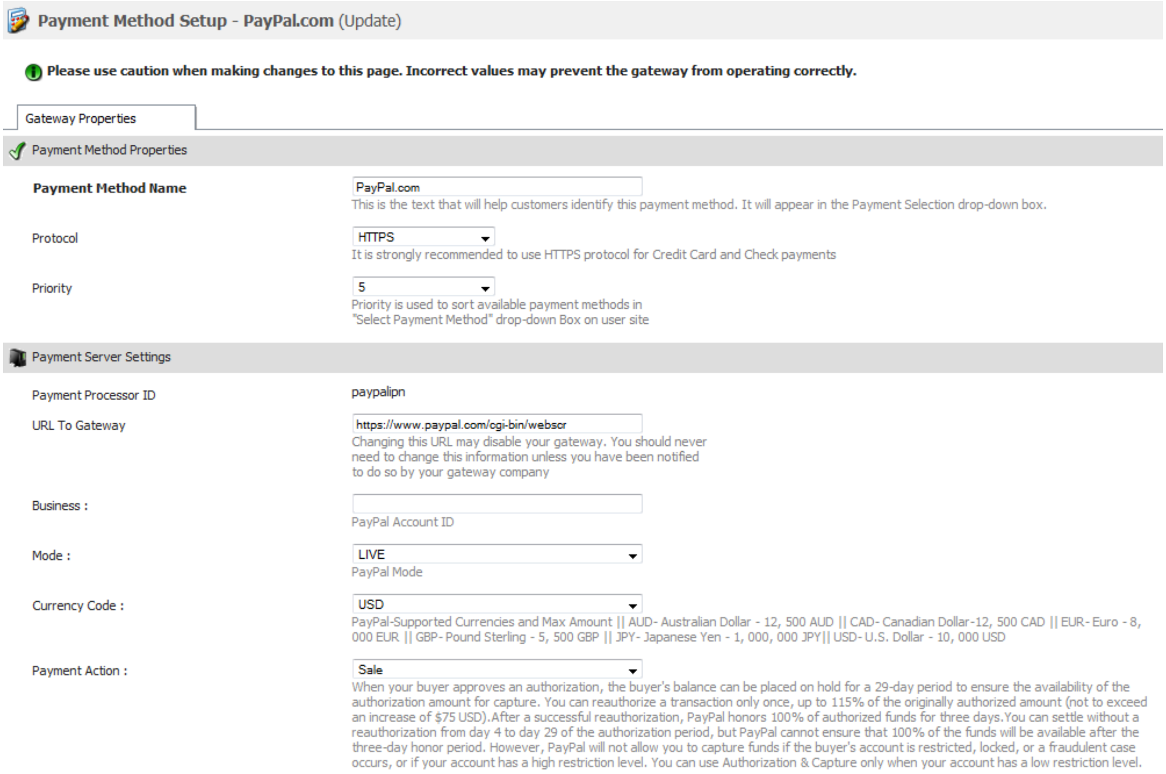


Click save and you're done.

PLEASE NOTE: You will need to have your SSL (Security Certificate) set up in the cart for PayPal Pro to work.

6.2.1.6 Setting Up PayPal.com

1. To use the **Paypal.com** gateway, you will need to have an account with Paypal.com.
2. Once that account is set up, login to your admin area and go to Cart Settings >> Payment Methods and activate the **PayPal.com** gateway.



3. Set the **Protocol** to **HTTP.**

4. Enter in your **PayPal Account information**.

5. Select your **Currency**.

6. Save your settings.

> **Important:** If you use the PayPal.com transaction method, your customers will be transferred over to PayPal.com to complete the transaction. Once the transaction is complete, they will be presented with a link within PayPal.com that allows them to return to Springboard Promocart. If the customer does not click this link, the cart will not know if the funds have been successfully transferred to your Paypal account. If you get a notification from PayPal.com that a customer has sent you money and you don't see the order in within the cart, it means the customer did not click the "Return to cart" link and you will need to search "Abandoned" orders in the cart to retrieve their order.

6.2.1.7 Setting Up WorldPay.com

1. Go to **WorldPay.com** and sign-up.

2. Once you receive an e-mail confirming you are approved on their system. In this e-mail will be your **Installation ID**, **Username** and Password. Login to your WorldPay account.

3. In the admin area of WorldPay you will see “Installations for xxxxx”, in that table

will be your Installation ID. Across from your Installation ID you will see a link for Configuration Options, click that link.

4. Enter the following information:

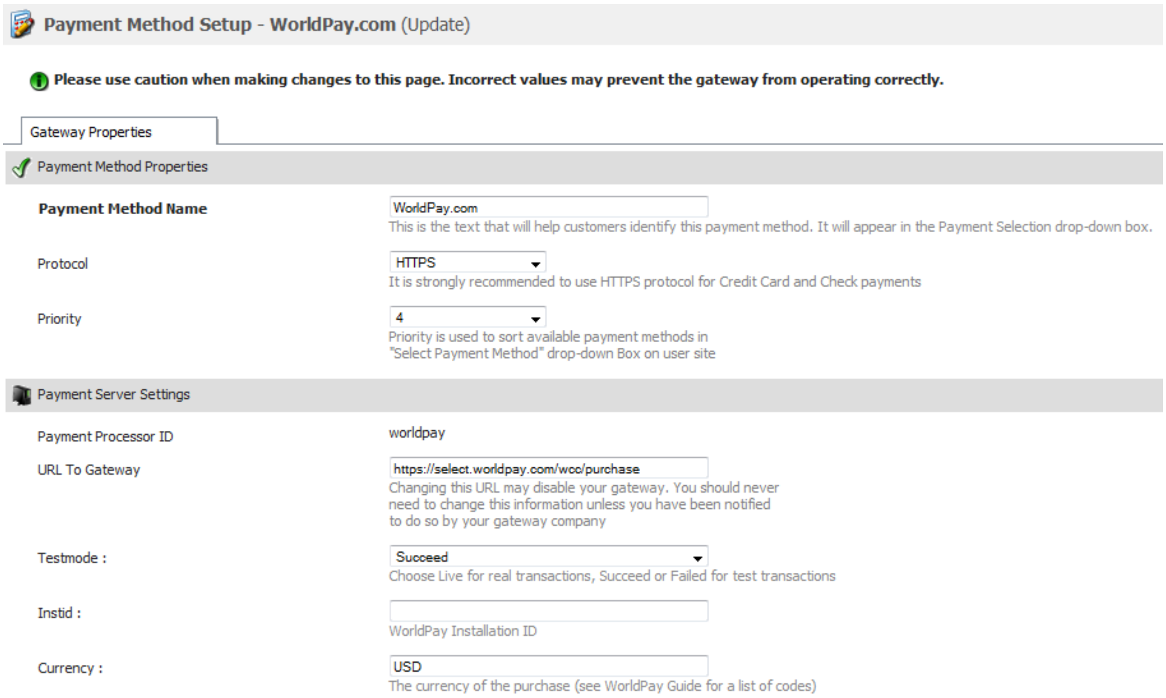
• In Your website URL for activation – Enter the URL to your site.
• In Callback URL – Enter http://www.yourstorename.com/index.php?p=invoice&oa=ProcessPayment (replace www.yourstorename.com with the actual URL to your store)
• Activate Call Back URL

Save your changes

5. Next login to your Springboard Promocart administration area and go to Payment Methods 142 located under Cart Settings.

6. Activate the WorldPay payment method

7. On the WorldPay Payment screen, do the following



a. Set the Protocol to HTTP

b. Enter in the URL to the WorldPay Gateway. (default is https://select.worldpay.com/wcc/purchase)

c. Enter your **WorldPay Installation ID** in the blank labeled Instid.

d. You can set the account to test mode is you like. Just be sure to set it to live for

real transactions.

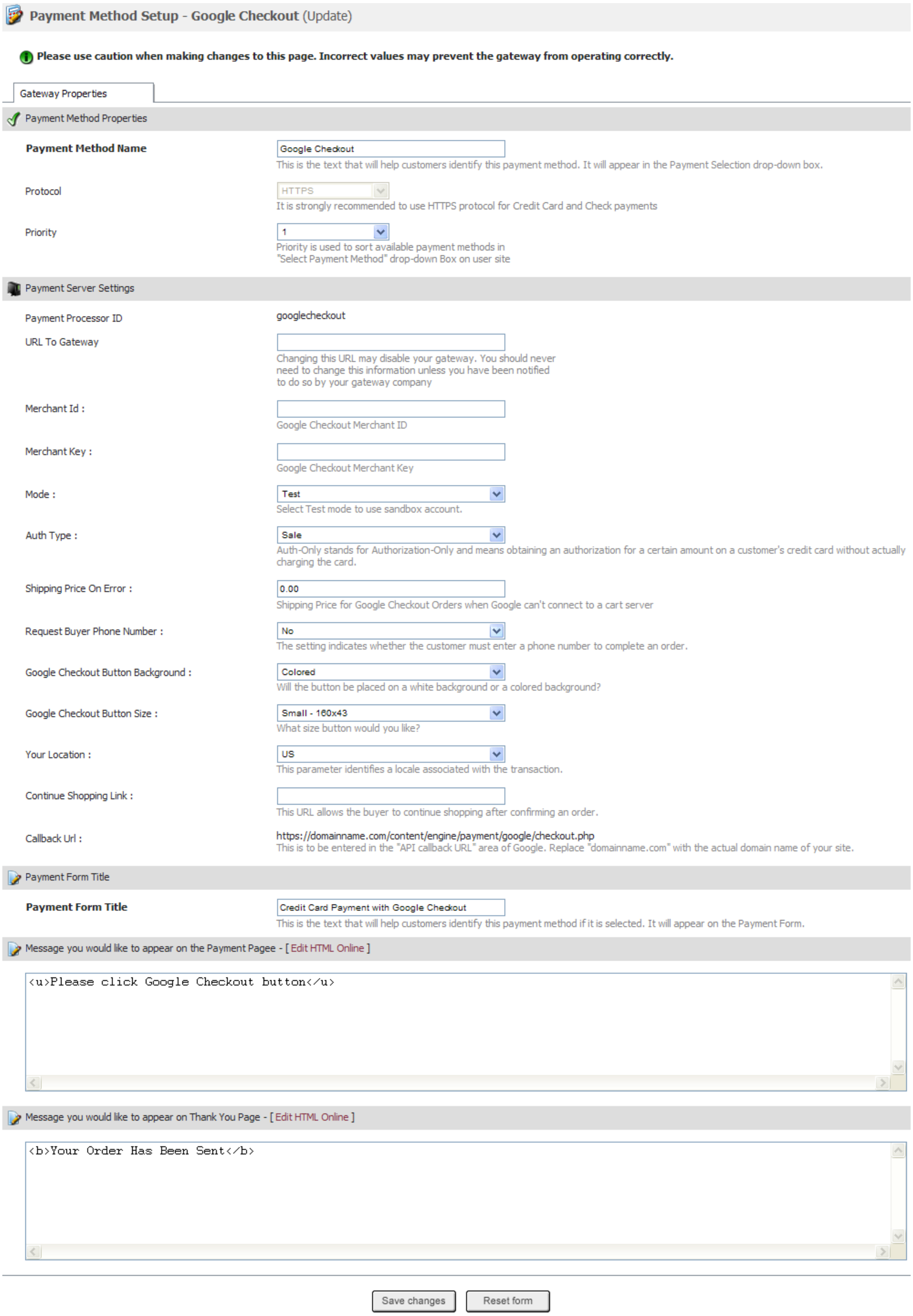
8. Save your changes.

6.2.1.8 Setting Up Google Checkout

Google Checkout is a payment system that can be used in the cart to accept credit cards.

To register for an account, click here .

Once you have registered, you will need to activate Google Checkout in the admin area of the cart and enter in your account information.



Payment Method Setup - Google Checkout (Update)

Please use caution when making changes to this page. Incorrect values may prevent the gateway from operating correctly.

Gateway Properties

Payment Method Properties

Payment Method Name — Google Checkout
This is the text that will help customers identify this payment method. It will appear in the Payment Selection drop-down box.

Protocol — HTTPS
It is strongly recommended to use HTTPS protocol for Credit Card and Check payments

Priority — 1
Priority is used to sort available payment methods in "Select Payment Method" drop-down Box on user site

Payment Server Settings

Payment Processor ID — googlecheckout

URL To Gateway
Changing this URL may disable your gateway. You should never need to change this information unless you have been notified to do so by your gateway company

Merchant Id :
Google Checkout Merchant ID

Merchant Key :
Google Checkout Merchant Key

Mode : — Test
Select Test mode to use sandbox account.

Auth Type : — Sale
Auth-Only stands for Authorization-Only and means obtaining an authorization for a certain amount on a customer's credit card without actually charging the card.

Shipping Price On Error : — 0.00
Shipping Price for Google Checkout Orders when Google can't connect to a cart server

Request Buyer Phone Number : — No
The setting indicates whether the customer must enter a phone number to complete an order.

Google Checkout Button Background : — Colored
Will the button be placed on a white background or a colored background?

Google Checkout Button Size : — Small - 160x43
What size button would you like?

Your Location : — US
This parameter identifies a locale associated with the transaction.

Continue Shopping Link :
This URL allows the buyer to continue shopping after confirming an order.

Callback Url : — https://domainname.com/content/engine/payment/google/checkout.php
This is to be entered in the "API callback URL" area of Google. Replace "domainname.com" with the actual domain name of your site.

Payment Form Title

Payment Form Title — Credit Card Payment with Google Checkout
This is the text that will help customers identify this payment method if it is selected. It will appear on the Payment Form.

Message you would like to appear on the Payment Pagee - [Edit HTML Online]

<u>Please click Google Checkout button</u>

Message you would like to appear on Thank You Page - [Edit HTML Online]

Your Order Has Been Sent

Save changes | Reset form

1. You do not need to modify the **'URL To Gateway'** or **'Checkout Button URL'** fields unless Google instructs you to do so.

2. You will want to use your **Google Checkout Vendor ID** and **Merchant Key** available from the Google Checkout API link.

3. Once you have input this information, you will need to set the **'Mode'** to either **'Test'** or **'Live'** depending on wether or not you want to test the gateway out live right away.

4. Auth-Only stands for Authorization-Only and means obtaining an authorization for a certain amount on a customer's account without actually charging the card and Sale means it will charge the account immediately.

5. This next area you can set the shipping price for Google Checkout Orders when Google can't connect to the cart server.

6. The Request Buyer Phone Number option is where you can indicate whether the customer must enter a phone number to complete an order.

7. Google Checkout Button Background section is to set the google checkout button to have a white background, or the same color background as the mycart box.

8. Google Checkout Button Size is the option where you can pick from 3 different sizes for the google checkout button.

9. The Your Location option allows you to set your carts location to be UK or US. This must be the same origin setting that you have for your google checkout account.

10. The Continue Shopping Link option is where you can set the "Continue Shopping" link on the google checkout server when a customer is done there. Most people just simply put there carts website address in that filed.

Make sure you have the call back url listed here into your settings over at google. <call them for instructions on where to put this.> <also note to replace domainname.com with your website domain name in this url when putting it into the google settings on the google server.>

6.2.1.9 Setting up Authorize.Net AIM 3.0

Steps for setting up an **Authorize.net** account in the cart.

1. Get an **Authorize.net** account.
Springboard Promocart uses the ADC Direct response method, Version : 3.0 (Simple Integration Method)

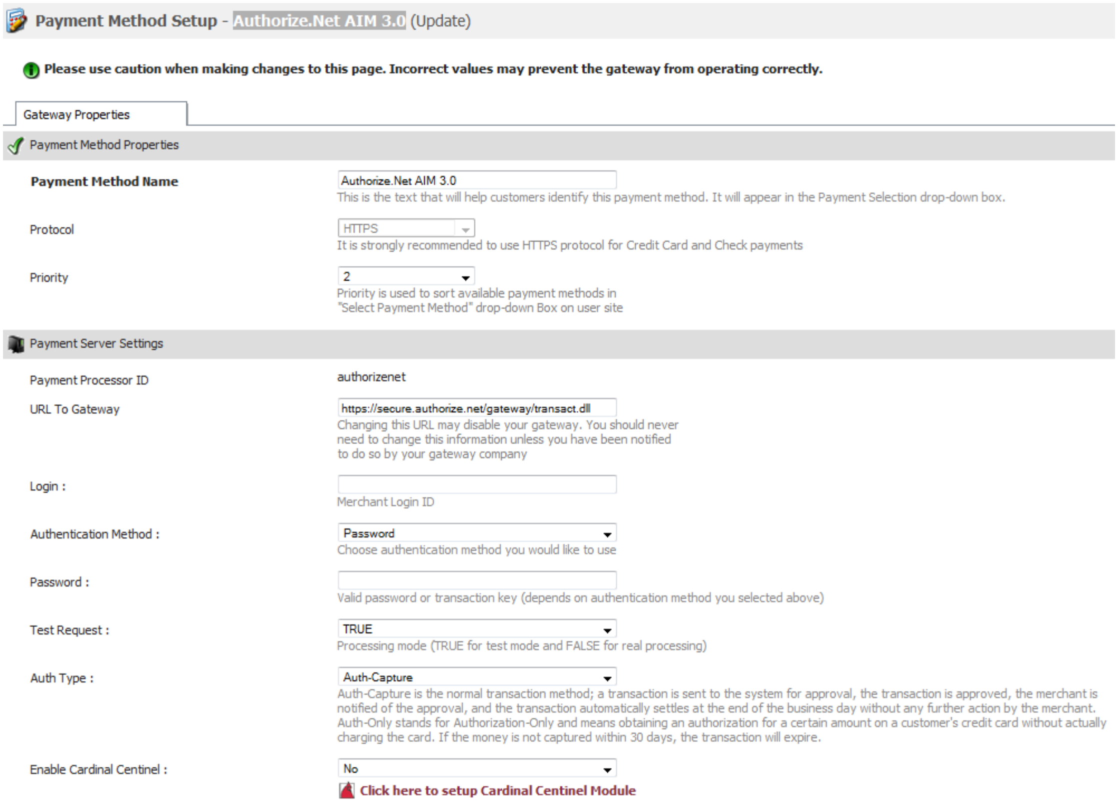
2. Login to your **Authorize.net** and go to Settings and Profiles area and look under the Security table. Specifically, make sure **Card Code Verification** and **Address Verification System (AVS)** are set as you would like them. These settings allow you to control security on your account and may help in preventing fraudulent transactions from being placed on Springboard Promocart.

3. Logout of **Authorize.net** and login to the Springboard Promocart Management area.

4. Go to Cart Settings >> Payment Methods and activate the Authorize 3.0 or 3.1.net gateway.

Important: You will need to have an SSL (Security Certificate) set up to transfer credit card information securely to the gateway.

5. Enter in your Authorize.net Login and Password or Transaction Key.



6. **If you are going to run a test transaction, set Test Request to True**. Once testing is complete, make sure you set this back to False. Any of the following card numbers can be used to run test transactions. Please note that these numbers do not represent real card accounts; they will return a decline in live mode, and an approval in test mode. Any expiration dates after the current day's date can be used with these numbers.

370000000000002 - American Express
6011000000000012 - Discover
5424000000000015 - MasterCard
4007000000027 – Visa

7. Set Auth Type to **AUTH_CAPTURE** or **AUTH ONLY** depending on the how you would like Authorize.net to handle your transactions. (default is AUTH_CAPTURE)

8. Make sure your currency code is set to USD. At this time **Authorize.net** is only accepting transactions in US DOLLARS.

9. Enable the credit cards you have set up on the **Authorize.net** system. Do not enable credit cards that are not associated with your **Authorize.net** account, this will only cause confusion with your customers.

10. Enter in the messages you would like to appear on the both the payment and thank-you page.

11. Click save settings and log-out.

6.2.1.10 Setting up Authorize.Net eCheck.Net

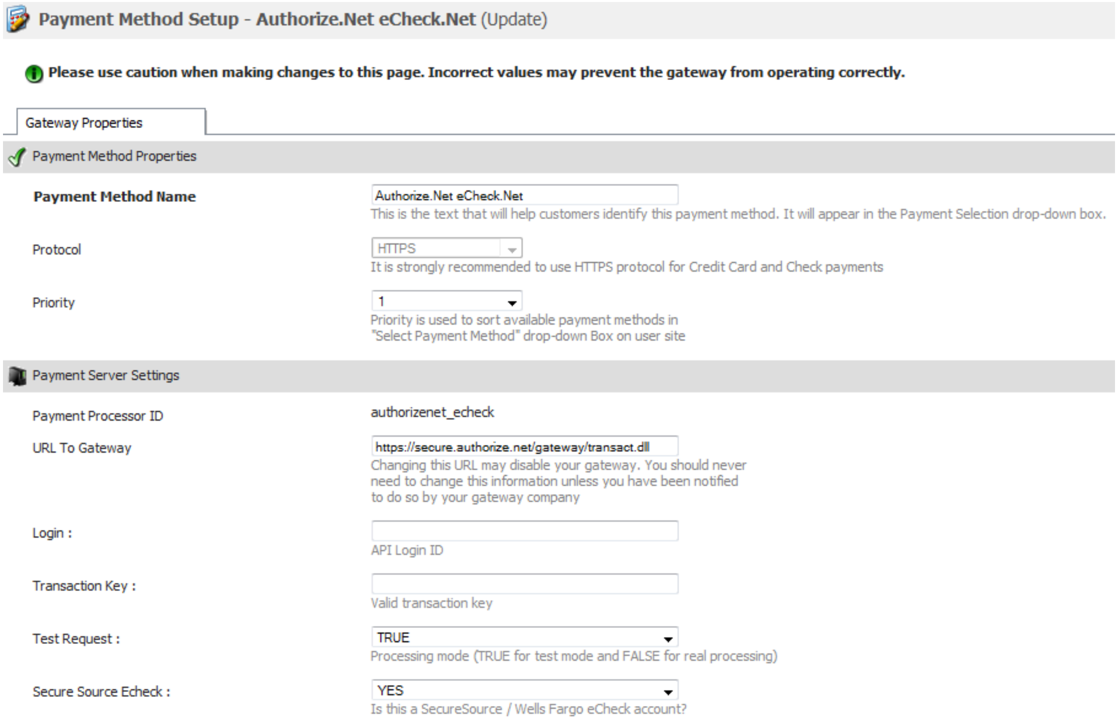
Steps for setting up an **Authorize.net eCheck.Net** account in the cart.

1. Get an **Authorize.net** account.
Springboard Promocart uses the ADC Direct response method, Version : 3.1 (Simple Integration Method)

2. Go to Cart Settings >> Payment Methods and activate the Authorize eCheck.Net gateway.

Important: You will need to have an SSL (Security Certificate) set up to transfer credit card information securely to the gateway.

3. Enter in your Authorize.net Login (API Login) and Transaction Key.



4. **If you are going to run a test transaction, set Test Request to True**. Once testing is complete, make sure you set this back to False.

5. Enter in the messages you would like to appear on the both the payment and thank-you page.

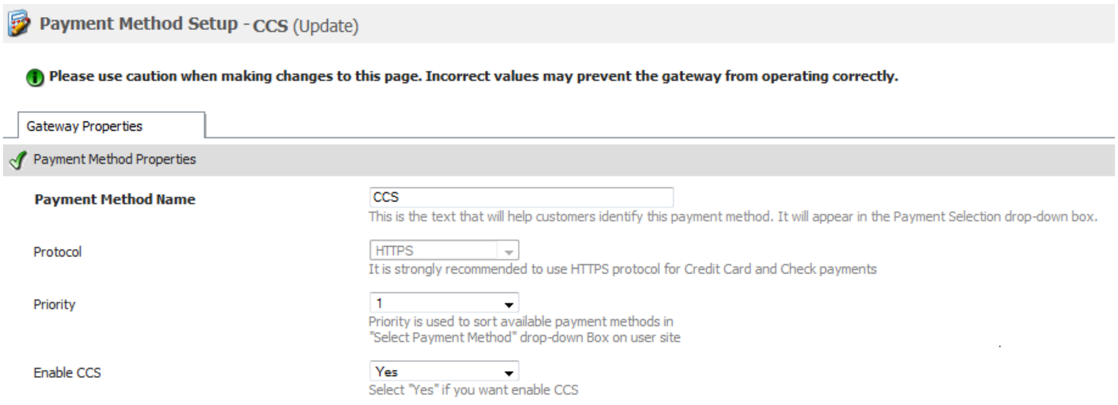
6. Click save settings and log-out.

6.2.1.11 Setting up CCS

Steps for setting up **CCS.**

1. Make sure you have setup your certificate in the CCS settings 140 before enabling this gateway.

2. Once there Enable the CCS by selecting 'Yes' as shown below.



3. Click save settings and log-out.

6.2.2 Update Realtime Payment Method

To **update realtime payment method**, follow the steps:

1. Open 142 the **Payment Methods (Quick Setup)** page.
2. Click **Update Payment Method Settings** icon in **Realtime Processing - Payment with Credit Card** for the realtime payment method you want to edit.
3. The **Payment Method (Update) page** opens, as shown in the Figure 6-19-3 145 where you can edit all the parameters.

Note: The only difference between update in **realtime processing** and update in custom **payment method** is **Payment Server** Settings section. In **realtime processing** there is **Payment Server** Settings section**,** as shown in the Figure 6-19-3 145.

4. If you want to cancel or start again, click on the **Reset form** button.
5. Click **Save changes** button to update the information.

6.2.3 Disable Realtime Payment Method

To **disable realtime payment method**, follow the steps:

1. Open 142 the **Payment Methods (Quick Setup)** page.
2. Click **Disable Realtime Payment Method** icon in **Realtime Processing - Payment with Credit Card** for the realtime payment method you want to remove.

A pop up appears asking for confirmation, as shown in the Figure 6-20-1 below.

Figure 6-20-1: Disable Confirmation

3. Confirm deletion process, by clicking **OK** button.

6.2.4 Add a New Custom Payment Method

In this section you can **add a new custom payment method** that can be used by your customers.

To **add a new custom payment method**, follow the steps:

1. Open 142 the **Payment Methods (Quick Setup) page**.
2. In the **Payment Methods (Quick Setup)** page, click on **Add a New Custom Payment Method** link.

The **Payment Method Setup - New Method (Insert)** page will open.

3. **Common Settings:** Enter the following information:
   a. **Payment Method Name:** Enter the text (i.e. Credit Card, Check, etc.) that will help customers to identify this payment method. It will appear in the Payment Selection drop-down menu.
   b. **Is This Method Available:** Select **Yes** from the drop-down menu if you want to receive payments using this method, otherwise select **No**. By default, it is **Yes**.
   c. **Protocol:** Select **HTTPS** or **HTTP** from the drop down menu, it is strongly recommended to use HTTPS, which is a secure protocol for Credit Cards, and Check payments. By default, it is **HTTPS**.
   d. **Priority:** Priority is used to sort available payment methods in **Select Payment Method** drop-down menu on the user's site. You can select this on a scale of 1 to 10, where 1 is given the highest priority. By default, it is **5**.

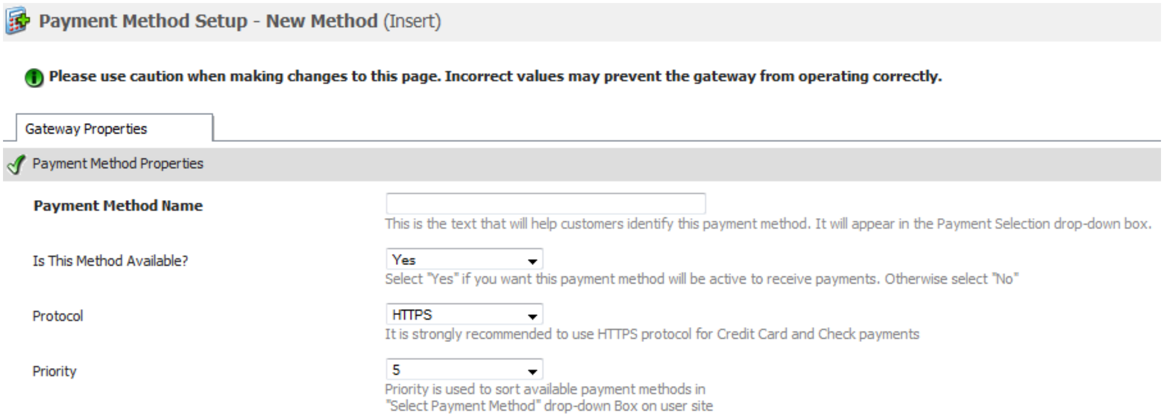


Figure 6-21-1: Common Settings

4. **Payment Form Title:** Enter the text that will help customers to identify payment method if it is selected. It will appear on the Payment Form.

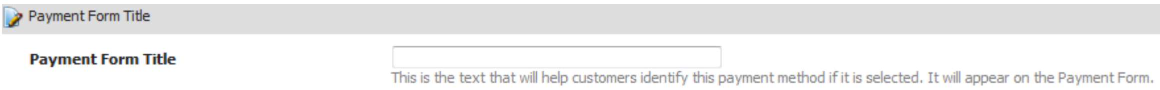


Figure 6-21-2: Payment Form Title

5. **Message you would like to appear on the Payment Page and Thank You Page:** Type the message you would like to appear on the Payment and Thank You Page.

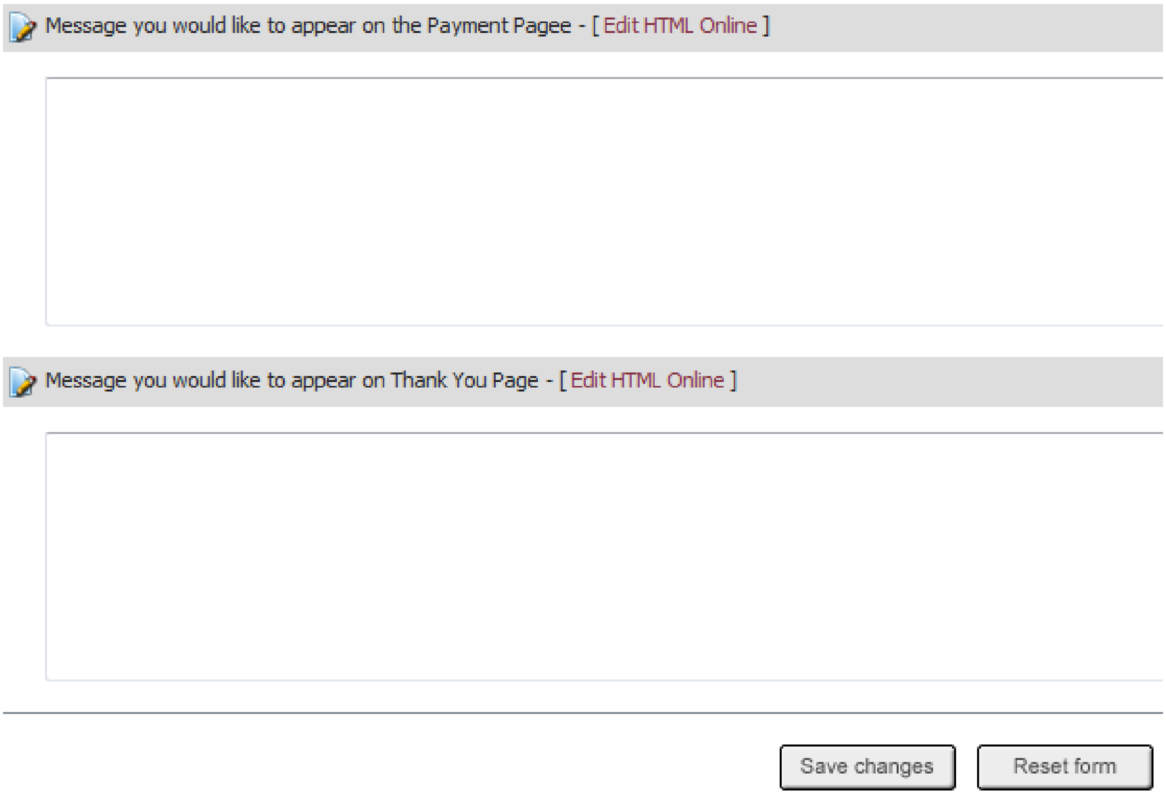


Figure 6-21-3: Message Box for Payment and Thank You Page

6. You can also create an eye-catching description by clicking **Edit HTML Online** in **Payment** and **Thank You** Page.
7. If you want to cancel or start again, click on **Reset form** button.
8. Click **Save changes** button to save details about new custom payment method under **Realtime Processing - Payment with Credit Card** in Payment Methods (Quick Setup) page 143.

6.2.5 Update Custom Payment Method

You can use this option to edit custom payment methods.

To **update custom payment method settings**, follow the steps:

1. Open 142 the **Payment Methods (Quick Setup)** page.
2. Click **Update Payment Method Settings** icon for the **Custom Payment Method** you want to edit.
3. The **Payment Method (Update)** page opens, as shown in the Figure 6-22-1 166 where you can edit all the parameters.

Note: The only difference between **update in realtime processing** and **update in custom payment method** is **Payment Server Settings** section. In **realtime processing** there is **Payment Server Settings** section.

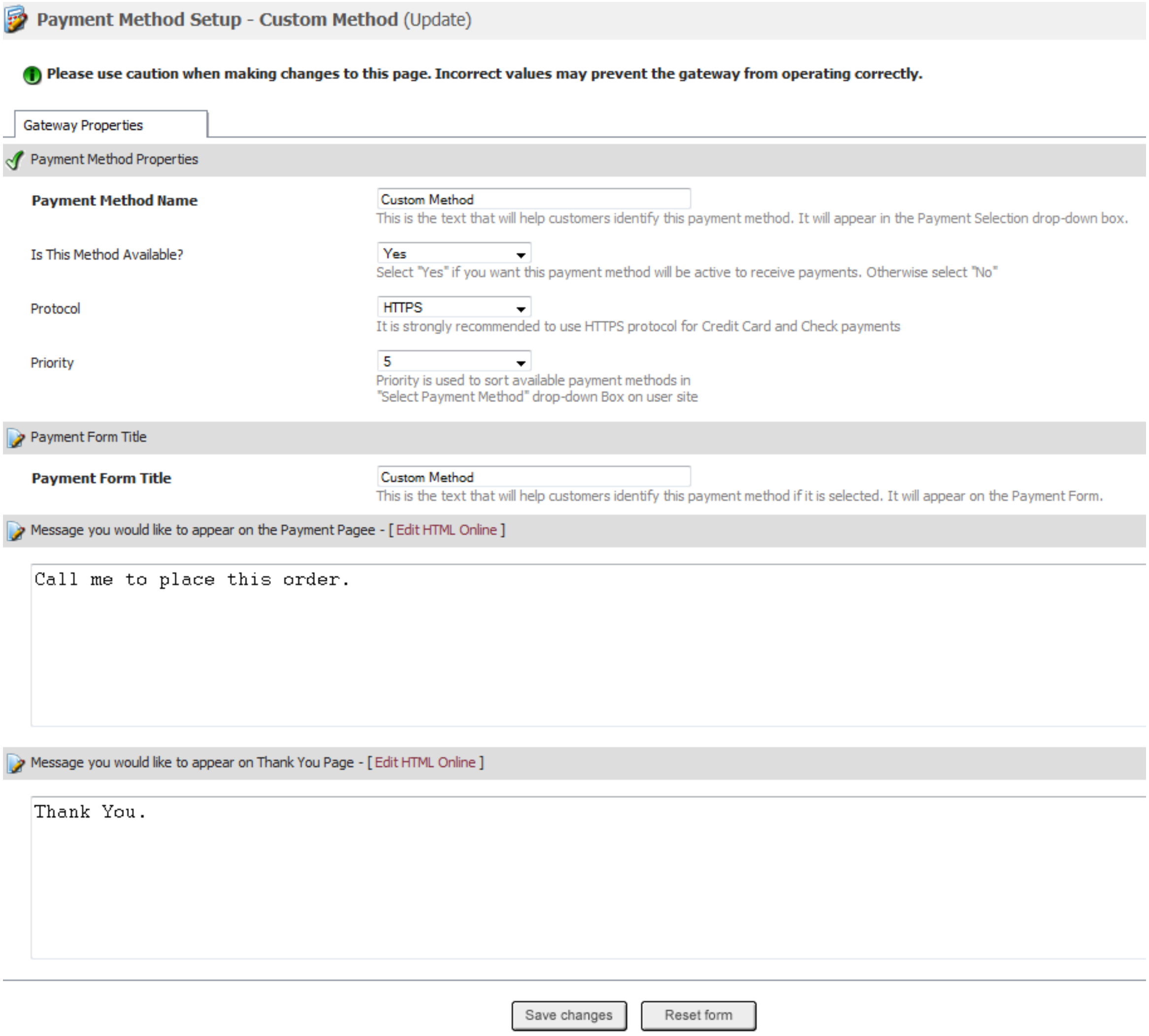


Figure 6-22-1: Update Custom Payment Method Page

4. If you want to cancel or start again, click on the **Reset form** button.
5. Click **Save changes** button to update the information.

6.2.6 Delete Custom Payment Method

You can use this option to delete custom payment methods settings.

To **delete custom payment methods** settings, follow the steps:

1. Open 142 the **Payment Methods (Quick Setup)** page.
2. Click **Delete Custom Payment Method** icon for **Custom Payment Method** you want to remove.

A pop up appears asking for confirmation, as shown in the Figure 6-23-1 below.

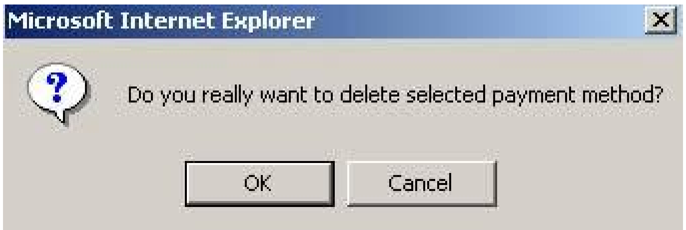


Figure 6-23-1: Delete Confirmation

3. Confirm deletion process, by clicking **OK** button.

6.3 Shipping Management

This section allows you to control the shipping settings and methods for the cart. You can choose not to have the cart calculate shipping, use UPS and USPS realtime shipping calculations or set up a custom shipping method to fulfill the needs.

To **manage the shipping settings of the cart**, follow the steps:

1. Click **Shipping Management**, as shown in the Figure 6-24-1 below.

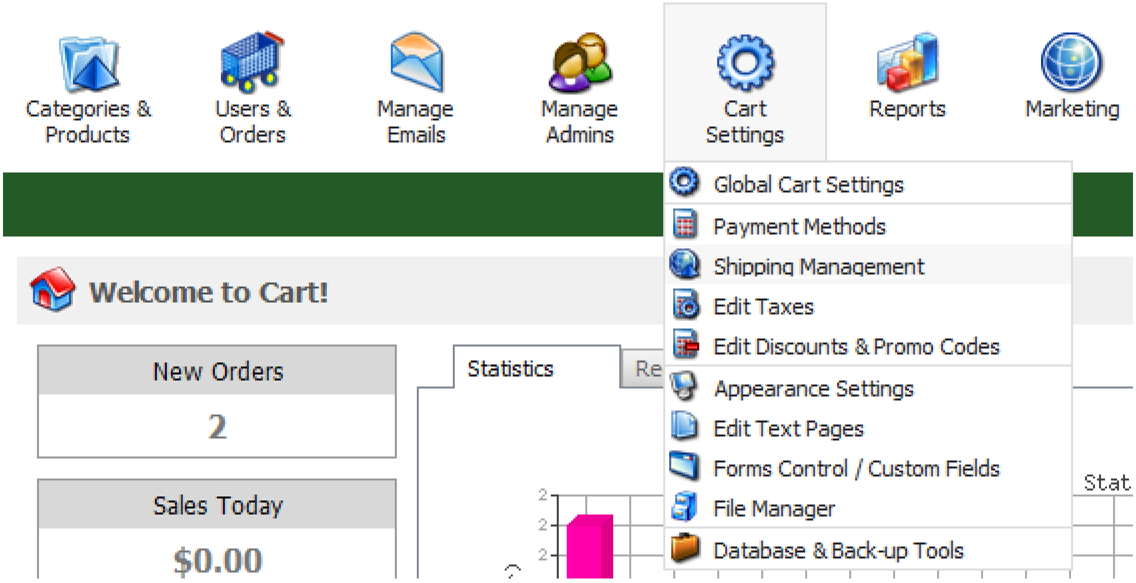


Figure 6-24-1: Shipping Management under Cart Settings

Shipping Management page will open under **Shipping Settings** tab.

Note: You can also open the **Shipping Management** page directly under **Shipping Settings** tab by clicking on **Shipping Management** link in the Admin Area Home page 8.

2. **Enable/Disable Shipping Calculation:** Enter the following information:
   a. **Enable Shipping:** Select **Yes** from the drop down menu to enable shipping charges and **No** to disable shipping charges completely. By

default, it is **Yes**.

b. **Display Shipping Prices:** Select **Yes** from the drop down menu to display shipping prices on shipping methods page. Selecting **No** won't display any information. By default, it is **Yes**.

c. **Allow International Shipping:** Select **Yes** from the drop down menu to allow international shipping. If **Yes** is selected, Cart will display shipping methods for all available countries. If **No** is selected, shipping is available only for country selected in Shipping Origin Settings 169. By default, it is **No**.

d. **Allow Shipping If No Available Methods:** Select **Yes** from the drop down menu to continue checkout and you will charge shipping costs in the future and if **No** is selected, error message will be displayed. By default, it is **No**.

e. **Display Shipping Weight:** Select **Yes** from the drop down menu to display product weight on product and catalog page. Selecting **No** won't display any information. By default, it is **Yes**.

f. **Display Product Shipping Price:** Select **Yes** from the drop down menu to display product shipping price on product page and if **No** is selected, the shipping price won't appear on the product page. You must add at least one shipping method on product level. By default, it is **Yes**.

g. **Enable "Shipping Quote" feature:** Select **Yes** from the drop down menu to enable the shipping quote feature, otherwise select **No**. If enabled, customers will be able to get a shipping quote for products within their cart before they register. By default, it is **No**.

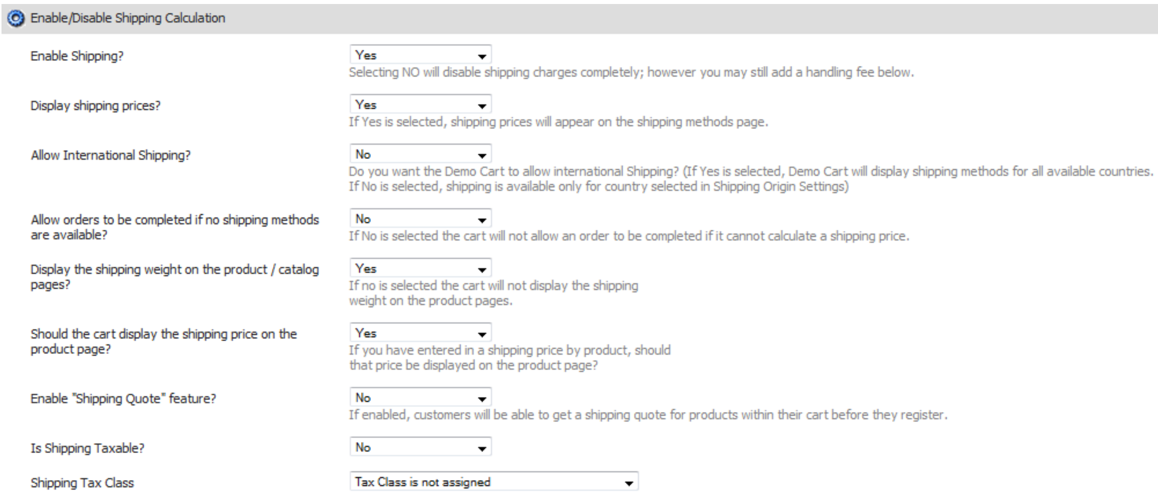


Figure 6-24-2: Enable/Disable Shipping Calculation

3. **Shipping Label:** In **Shipping Label Text**, enter the Shipping Text message you would like on the Order page and in the Invoice, as shown in the Figure 6-24-3 below.

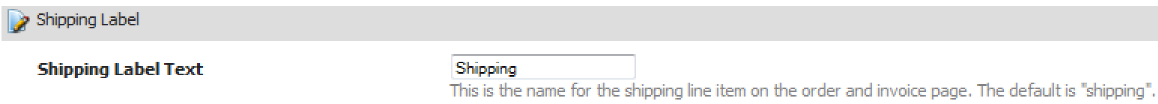


Figure 6-24-3: Shipping Label

4. **Handling Fee:** Enter the following information:
   a. **Charge Per-Order Handling Fee:** Enter the charge per-order handling fee and select from the drop down menu it is in **%** or **$**. Keep it as "0.00" if you do not wish to add a handling fee.
   b. **Is Handling Fee Taxable:** Select **Yes** from the drop down menu if it is taxable, otherwise select **No**. By default, it is **No**.
   c. **Show Handling Separately:** Select **Yes** from the drop down menu if you want the handling to show separately on the billing page, otherwise select **No**. By default, it is **No**.
   d. **Handling Text:** Enter the handling text message, as you would like to appear.

Note: Handling Fee are optional fields.

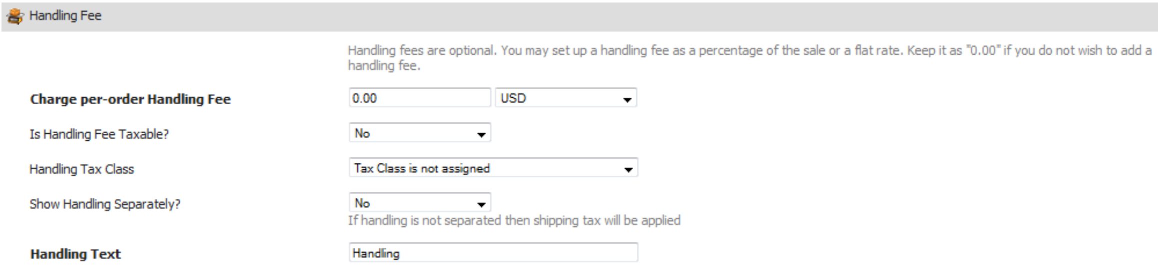


Figure 6-24-4: Handling Fee

5. **Shipping Origin Settings (Realtime):** Enter the following information:
   a. **City:** Enter the name of the City.
   b. **State/Province Name:** Select the State/Province Name from the drop down menu.
   c. **ZIP/Postal Code:** Enter the zip/postal code.
   d. **Origin Country:** Select the Origin Country from the drop down menu.

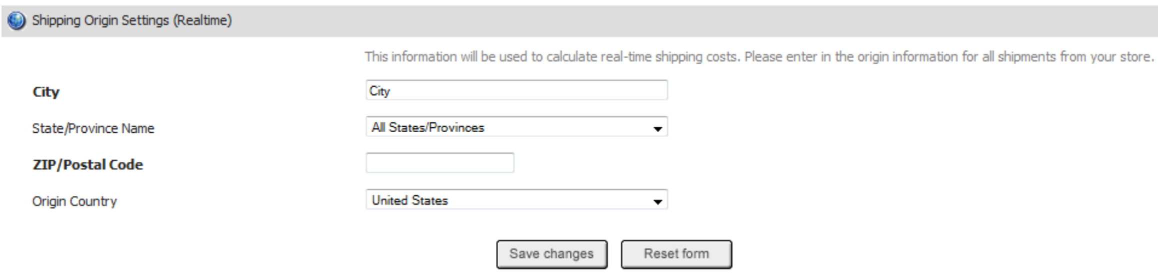


Figure 6-24-5: Shipping Origin Settings (Realtime)

6. If you want to cancel or start again, click on the **Reset form** button.
7. Click **Save changes** button to save details.

A confirmation pop up appears, as shown in the Figure 6-24-6 below, which will tell that the shipping settings have been saved successfully.

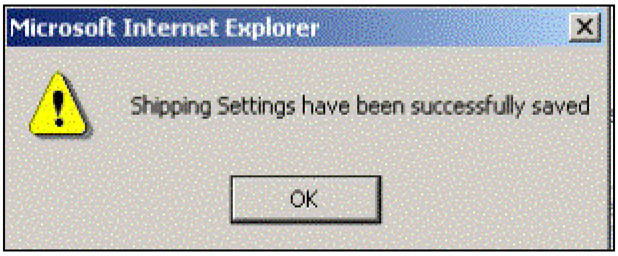


Figure 6-24-6: Save Confirmation

8. Click **OK** button.

You can also add 174, edit 176 & delete 177 a **custom shipping method**; add 170, edit 172 & delete 173 a **realtime shipping method** and edit Fed-Ex, UPS and USPS Realtime Configuration 177 in the Shipping Management page 168.

To know in detail about the following sections, click on respective links below:

6.3.1 Add a Realtime Shipping Method

To **add a realtime shipping method**, follow the steps:

1. Open 167 the **Shipping Management** page.

Note: By default, the **Shipping Management** page opens under **Shipping Settings** tab**.**

2. In the **Shipping Management page**, click on **Realtime Calculation** tab.

The **Realtime Shipping Costs Calculation Settings** page opens, as shown in the Figure 6-25-1 below.

Note: You can also **edit** and **delete** the **realtime shipping** method from the **Realtime Shipping Costs Calculation Settings** page**.** To know more about editing 172 and deleting 173 **realtime shipping** method, click on each of the links.

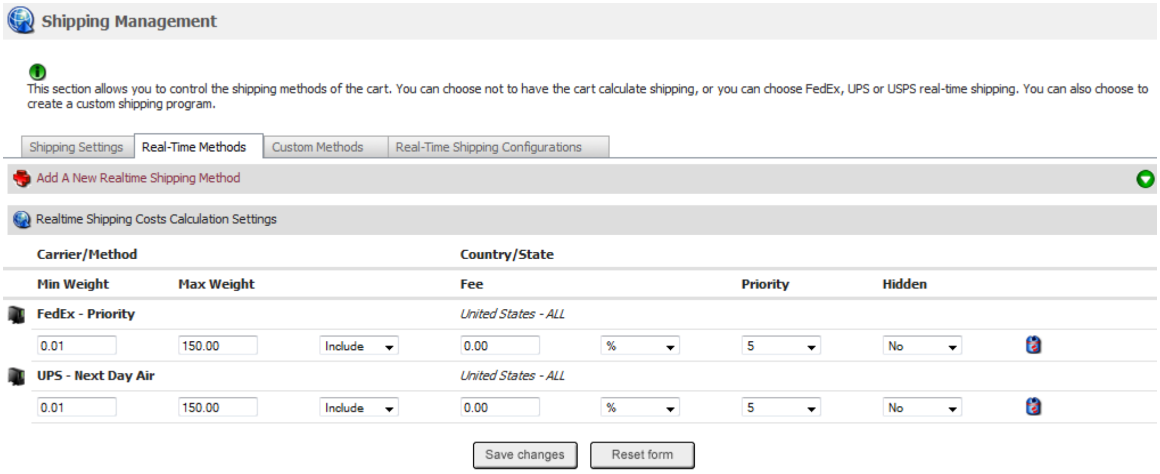


Figure 6-25-1: Realtime Shipping Costs Calculation Settings page

3. Click on **Add A New Realtime Shipping Method** link, in the bottom of the **Realtime Shipping Costs Calculation Settings** page, to expand it.

Scroll down to **Add A Realtime Shipping Method** in the bottom of the **Realtime Shipping Costs Calculation Settings** page, as shown in the Figure 6-25-2 172 below.

4. **Add A Realtime Shipping Method:** Enter the following information:
   a. **Carrier-Method Name:** Select the **Carrier-Method Name** from the drop down menu by clicking on it.
   b. **Country:** Select the **Country** from the drop down menu by clicking on it.
   c. **State/Province:** Select the **State/Province** from the drop down menu by clicking on it. You can also select **All States/Provinces**.
   d. **Min/Max Weight:** Enter the **minimum and maximum weight** and select from the drop down menu that it **Include range** or **Exclude range**.
   e. **Additional Fee:** Enter the **additional fee** and depending on whether it is a percentage of shipping charges or a fixed amount in dollars selects the value from the drop down menu.
   f. **Priority:** Select the **Priority** from the drop down menu. You can select this on a scale of 1 to 10, where 1 is given the highest priority. The higher the number, the higher will be the listing.
   g. **Hidden:** Select **Yes** from the drop down menu if you want to hide this Shipping Method, otherwise select **No**.

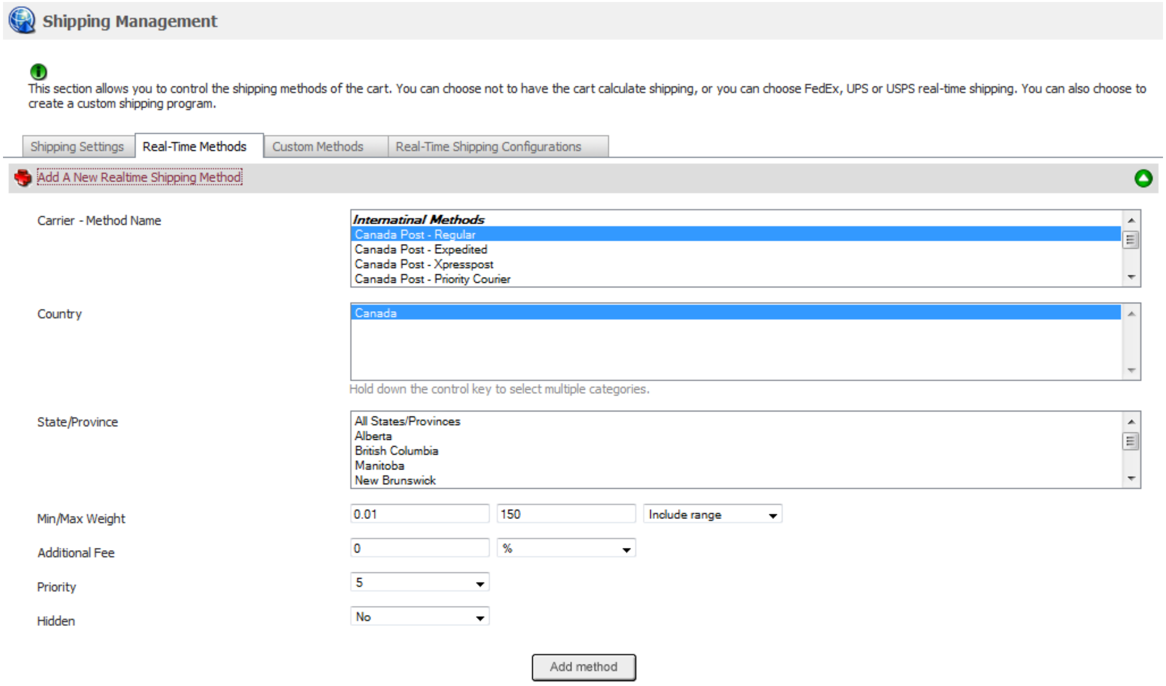


Figure 6-25-2: Add A Realtime Shipping Method

5. Click **Add method** button.

A confirmation pop up appears, as shown in the Figure 6-25-3 below, which will tell that the new realtime shipping method has been successfully added.

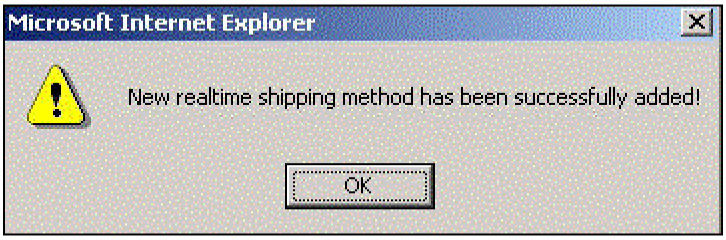


Figure 6-25-3: Realtime Shipping Add Confirmation

6. Click **OK** button.

6.3.2 Edit a Realtime Shipping Method

To **edit a realtime shipping method**, follow the steps:

1. Open 170 the **Realtime Shipping Costs Calculation Settings** page.
2. You can edit any of the **realtime shipping method** information in **Realtime Shipping Costs Calculation Settings** page.
3. If you want to cancel or start again, click on the **Reset form** button.
4. Click **Save changes** button to update the information.

A confirmation pop up appears, as shown in the Figure 6-26-1 below, which will tell that the changes have been saved successfully.

Figure 6-26-1: Saved Confirmation

5. Click **OK** button.

6.3.3 Delete a Realtime Shipping Method

To **delete a realtime shipping method**, follow the steps:

1. Open 170 the **Realtime Shipping Costs Calculation Settings** page.
2. Click **Delete Realtime Method** icon for the realtime shipping method you want to remove.

A pop up appears asking for confirmation, as shown in the Figure 6-27-1 below.

Figure 6-27-1: Delete Confirmation

3. Confirm deletion process, by clicking **OK** button.

You will get a confirmation message that the selected realtime shipping method has been successfully removed, as shown in the Figure 6-27-2 below.

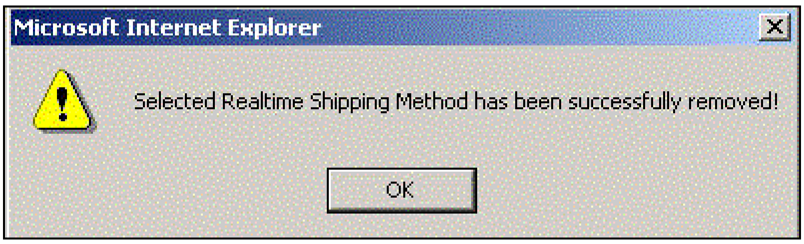


Figure 6-27-2: Selected Realtime Shipping Method Delete Confirmation

4. Click **OK** button.

6.3.4 Add a Custom Shipping Method

To **add a custom shipping method**, follow the steps:

1. Open 167 the **Shipping Management** page.

Note: By default, the **Shipping Management** page opens under **Shipping Settings** tab**.**

2. In the **Shipping Management** page, click on the **Custom Calculation** tab.

The **Custom Shipping Costs Calculation Settings** page opens, as shown in the Figure 6-28-1 below.

Note: You can also **edit** and **delete** the custom shipping method from the **Custom Shipping Costs Calculation Settings** page**.** To know more about editing 176 and deleting 177 a **custom shipping** method, click on each of the links**.**

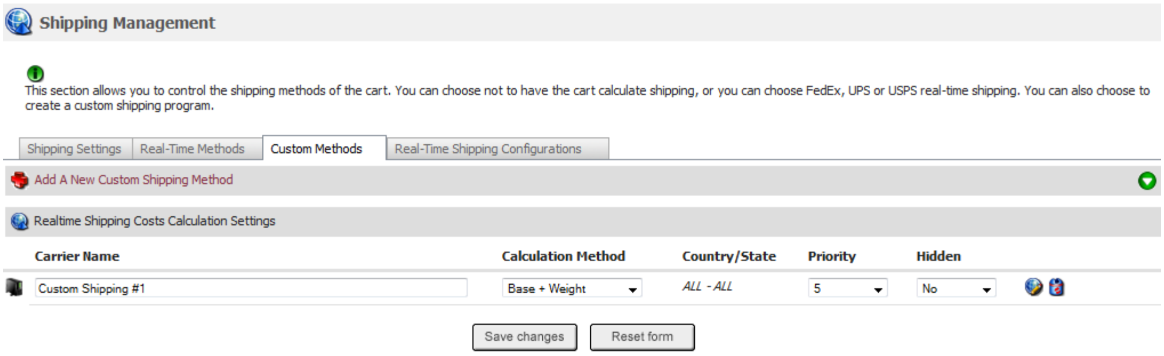


Figure 6-28-1: Custom Shipping Costs Calculation Settings page

3. Click on **Add A New Custom Shipping Method** link in the bottom of the **Custom Shipping Costs Calculation Settings** page, to expand it.

Scroll down to **Add A New Custom Shipping Method** in the bottom of the **Custom Shipping Costs Calculation Settings** page, as shown in the Figure 6-28-2 175 below.

4. **Add A New Custom Shipping Method:** Enter the following information:
   a. **Carrier Name:** Enter the carrier name.
   b. **Calculation Method:** Select the calculation method (Weight, At product level, Price-based, etc.) from the drop down menu.
   c. **Countries:** Select the country from the drop down menu. You can also select **ALL COUNTRIES** from the drop down menu.
   d. **State/Province:** Select the State/Province from the drop down menu.
   e. **Priority:** Select the Priority from the drop down menu. You can select this on a scale of 1 to 10, where 1 is given the highest priority. The higher the number, the higher it will be listed.
   f. **Hidden:** Select **Yes** from the drop down menu if you want to hide this Custom Shipping Method, otherwise select **No**.

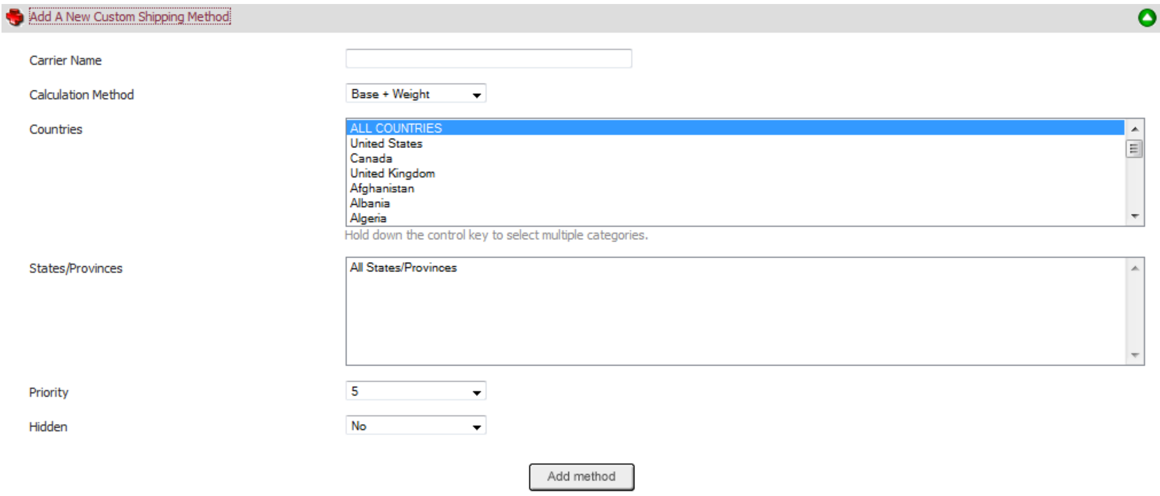


Figure 6-28-2: Add A New Custom Shipping Method

5. Click **Add method** button.

The **Custom Shipping Rates** page opens, as shown in the Figure 6-28-3 below.

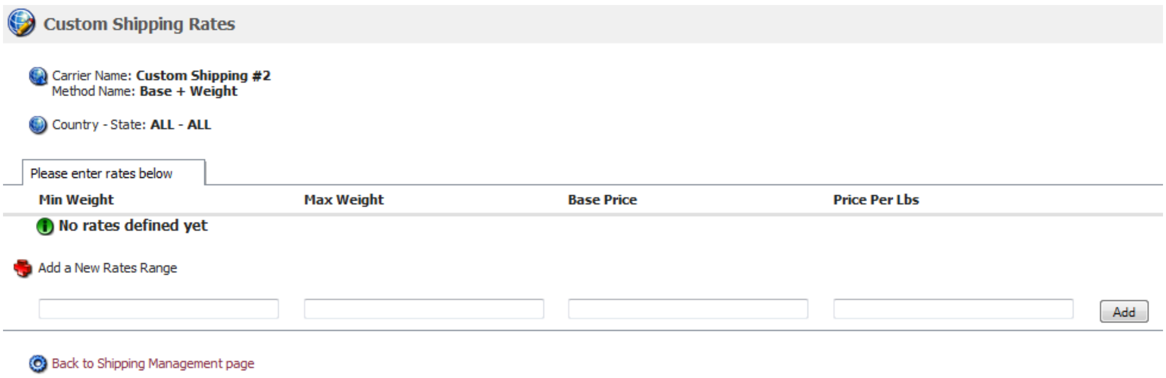


Figure 6-28-3: Custom Shipping Rates

6. To add Shipping Rates for this Custom Method, enter the **Min Weight**, **Max Weight**, **Base Price** and **Price Per Lbs**.
7. Click **Add** button to add the new custom range.

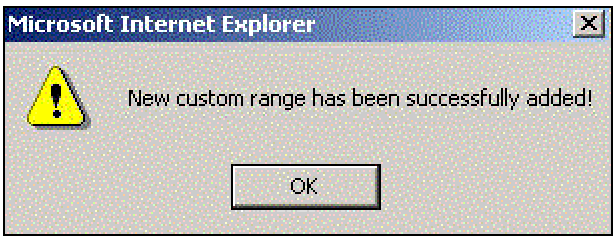


Figure 6-28-4: Custom Shipping Rates Add Confirmation

6.3.5 Edit a Custom Shipping Method

To **edit a custom shipping method**, follow the steps:

1. Open 174 the **Custom Shipping Costs Calculation Settings** page.
2. Click **Edit Shipping Rates for This Method** icon for the custom shipping method you want to modify.

The **Custom Shipping Rates** page opens, as shown in the Figure 6-29-1 below, where you can edit the shipping rates range.

Note: You can also add many different levels by **Adding New Rates Range** in the **Custom Shipping Rates** page. To **add new rates range**, enter the information and click **Add** button. To know more about **adding a custom rates range**, click here 175.

3. Edit any of the information in **Custom Shipping Rates** page.

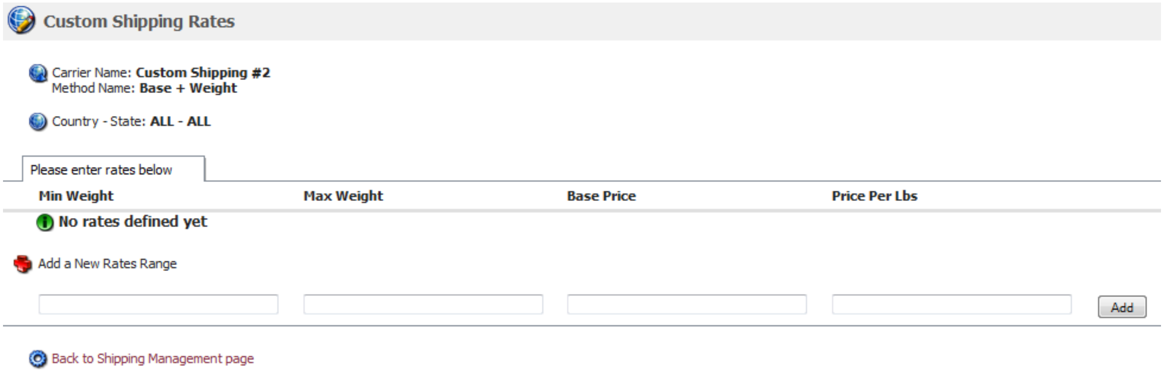


Figure 6-29-1: Edit Custom Shipping Rates page

4. If you want to cancel or start again, click on the **Reset form** button.
5. Click **Save changes** button to update the information.

A confirmation pop up appears, as shown in the Figure 6-29-2 below, which will tell that the changes have been saved successfully.

Figure 6-29-2: Saved Confirmation

6. Click **OK** button.

6.3.6 Delete a Custom Shipping Method

To **delete a custom shipping method**, follow the steps:

1. Open 174 the **Custom Shipping Costs Calculation Settings** page.
2. Click **Delete Custom Method** icon for the custom shipping method you want to remove.

A pop up appears asking for confirmation, as shown in the Figure 6-30-1 below.

Figure 6-30-1: Delete Confirmation

3. Confirm deletion process, by clicking **OK** button.

You will get a confirmation message that the selected custom shipping method has been successfully removed, as shown in the Figure 6-30-2 below.

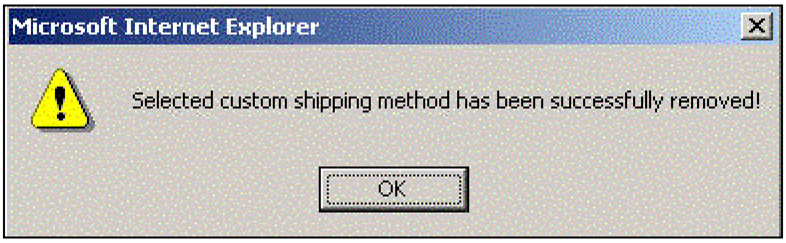


Figure 6-30-2: Selected Custom Shipping Method Delete Confirmation

4. Click **OK** button.

6.3.7 Fed-Ex, UPS and USPS Realtime Configuration

This section can be used to set or edit realtime-shipping gateway (UPS, USPS and Fed-Ex Gateway Settings).

To set up **realtime shipping gateway** follow the steps:

1. Open 167 the **Shipping Management** page.

Note: By default, the **Shipping Management** page opens under **Shipping Settings** tab**.**

In the **Shipping Management** page, click on **Real-time Shipping Configurations** tab.

2. The **Real-time Shipping Configurations** page opens.

3. **UPS Gateway Settings:** Enter the following information, as shown in the Figure 6-31-1 179 below.
   a. To set up UPS real-time shipping you will first need to have an account with UPS. To set up an account
   b. Next you will need to generate a XML access key though UPS to get rates. To generate this key, login to your UPS account and generate a Developer Key by going to the following location: https://www.ups.com/e_comm_access/laServ?CURRENT_PAGE=INTRO&OPTION=ACCESS_LICENSE&loc=en_US
   c. Once that is complete, you will have the ability to generate a XML access key. Once you have that key, copy and paste that information into the UPS area of the cart along with the username and password to your account.

The following URLs exist for connecting the cart to UPS:

https://www.ups.com/ups.app/xml/Rate
https://www.ups.com/ups.app/xml/Track

UPS Rate Chart: Select from the UPS Rate Chart drop down menu, which rate chart (Regular Daily Pickup, On Call Air, etc.) applies to the shipment. By default, this is **Regular Daily Pickup**. **Regular Daily Pickup** rates are the lowest published rates, and apply to the majority of UPS shipments.
UPS Container: UPS Container drop-down menu allows you to specify the shipping container type (Your Packaging, UPDS Tube, etc.). It is a global setting and will be applied to all products in Springboard Promocart. By default, this is **Your Packaging**.
UPS residential or commercial delivery: Select from the drop down menu, it is a **residential** or **commercial** delivery.

Note: Unless you have very specific shipping requirements, you should be using the default methods**.**

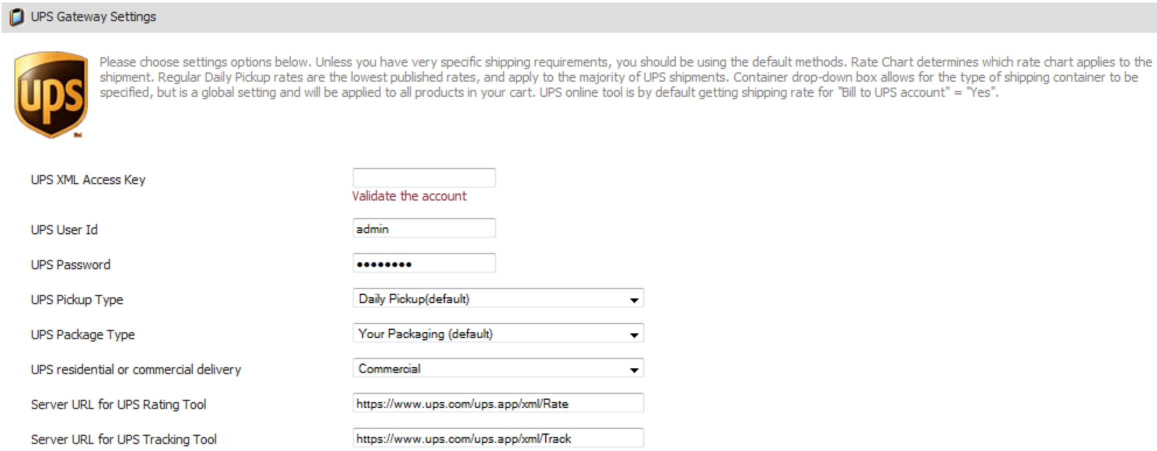


Figure 6-31-1: UPS Gateway Settings

4. **USPS Gateway Settings:** Enter the following information, as shown in the Figure 6-31-2 below. First you will need to get an account through http://www.uspswebtools.com/registration/
   a. **USPS Web Tools User ID:** Enter the USPS Web Tools User ID.
   b. **USPS Server URL:** Enter the USPS Server URL.

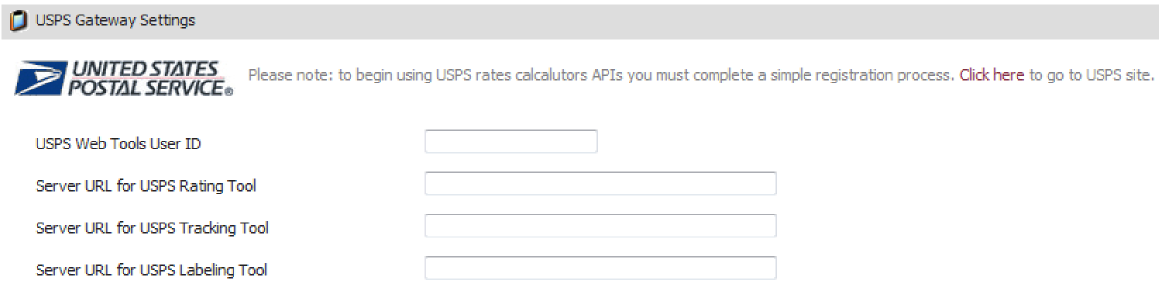


Figure 6-31-2: USPS Gateway Settings

5. **Canada Post Gateway Settings:** Insert your Merchant ID into the 'Canada Post Merchant ID' field after going to http://www.canadapost.ca/ to sign up for an account. You will need to get your Server URL for Canada Post Rating tool from Canada Post. Do not change the values in 'Server URL for Canada Post Tracking tool'.

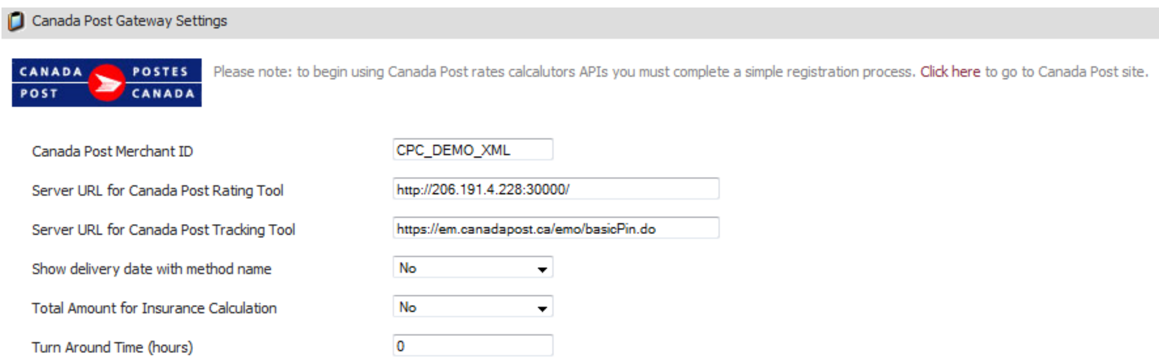


Figure 6-31-3: Canada Post gateway Settings

6. **FedEx Gateway Settings:** Enter the following information, as shown in the Figure 6-31-3 below.
    a. **FedEx Account Number:** Enter the FedEx Account Number.
    b. **FedEx Meter:** Enter the FedEx Meter.

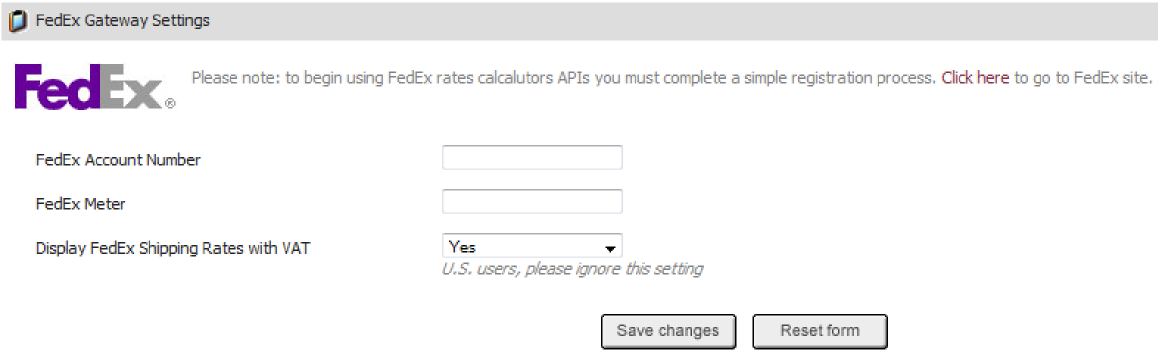


Figure 6-31-4: FedEx Gateway Settings

7. If you want to cancel or start again, click on the **Reset form** button.
8. Click **Save changes** button to save details.

Note: You can also generate **FedEx Meter Number**, by clicking on icon or **Generate FedEx Meter Number** link.

9. **Generate FedEx Meter Number:** Click icon or **Generate FedEx Meter Number** link to open the Generate FedEx Meter Number Page, as shown in the Figure 6-31-4 below.

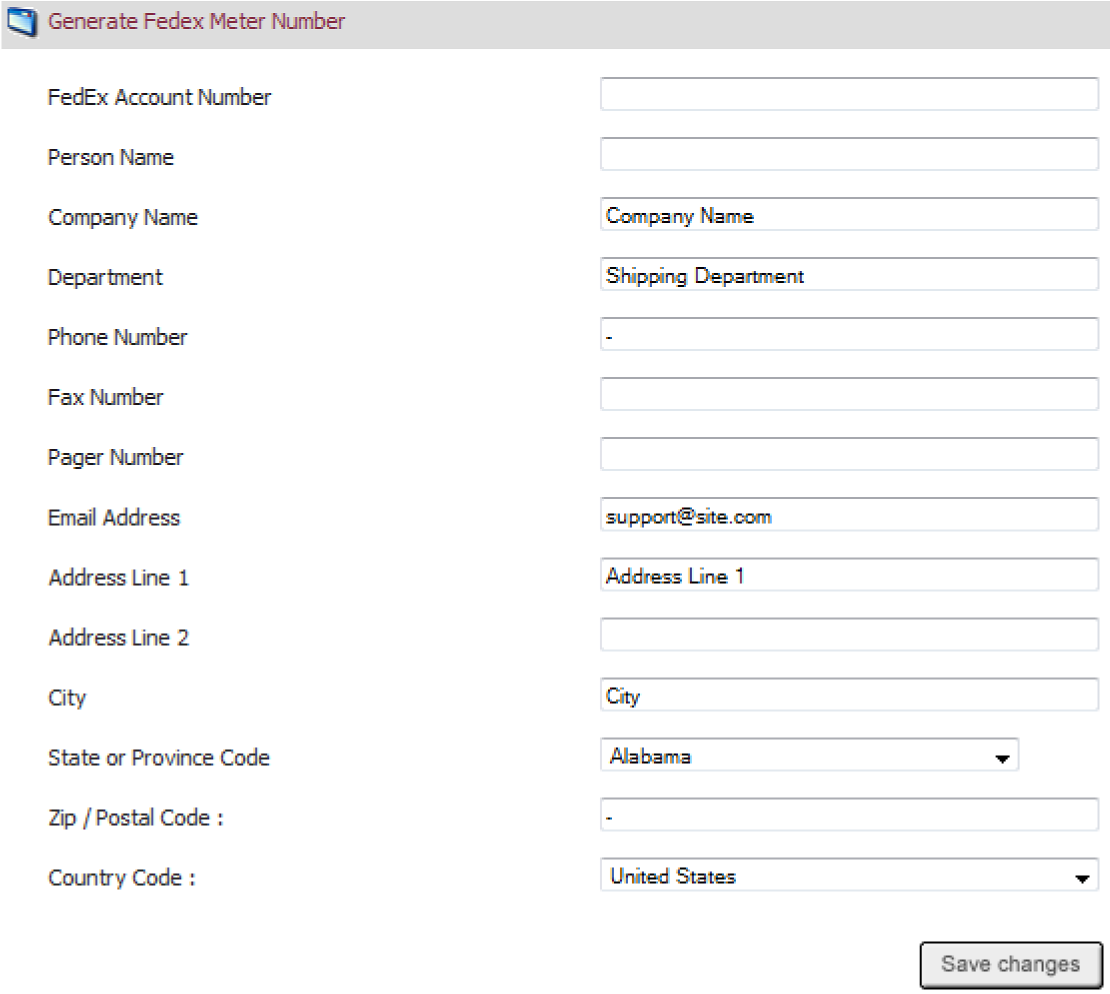


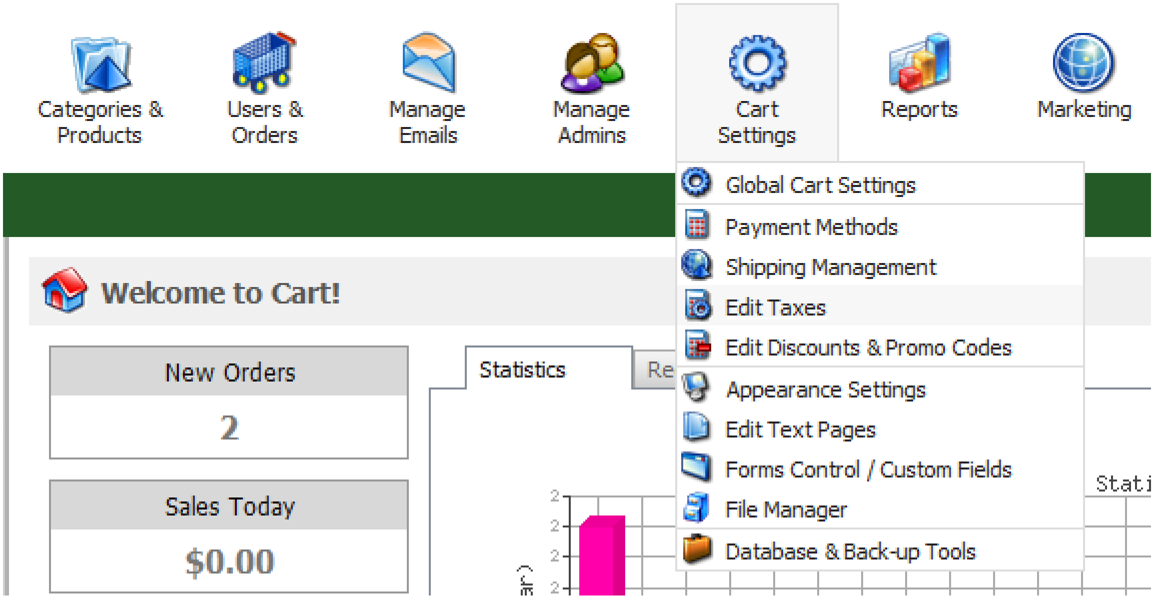
Figure 6-31-5: Generate FedEx Meter Number

10. Enter the information under Generate FedEx Meter Number and click **Save changes** button.
11. If you want to cancel or start again, click on the **Reset form** button.

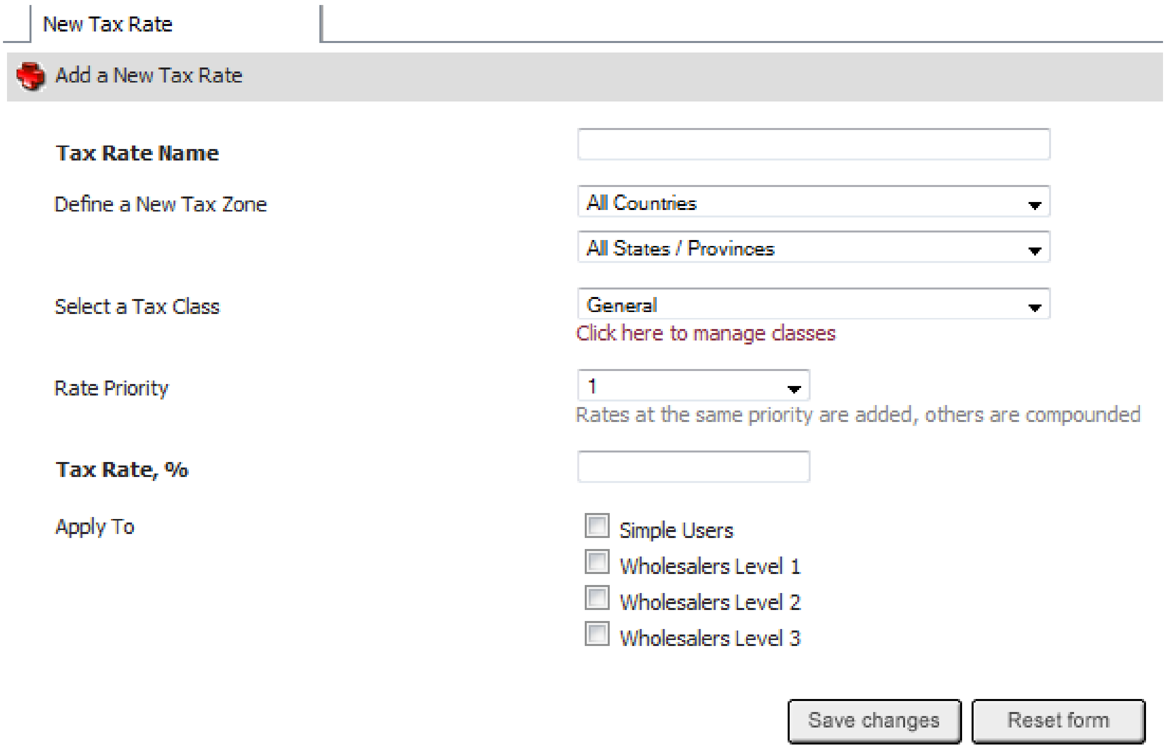
6.4 Edit Taxes

Setting up taxes:

1. Go to **'Edit Taxes'** page under **'Cart Settings'**.



2. Define settings for the tax you are creating under **'Edit Tax Settings'** tab. **'Default Tax Country'** and **'Default Tax State'** are used to calculate taxes on product page(s) before user logs in for VAT.



3. After you complete this page, you should now have a working tax scheme setup.

6.4.1 Advanced Tax Setup

Setting up taxes using Advanced Mode.

1. Go to **'Edit Taxes'** page under **'Cart Settings'**

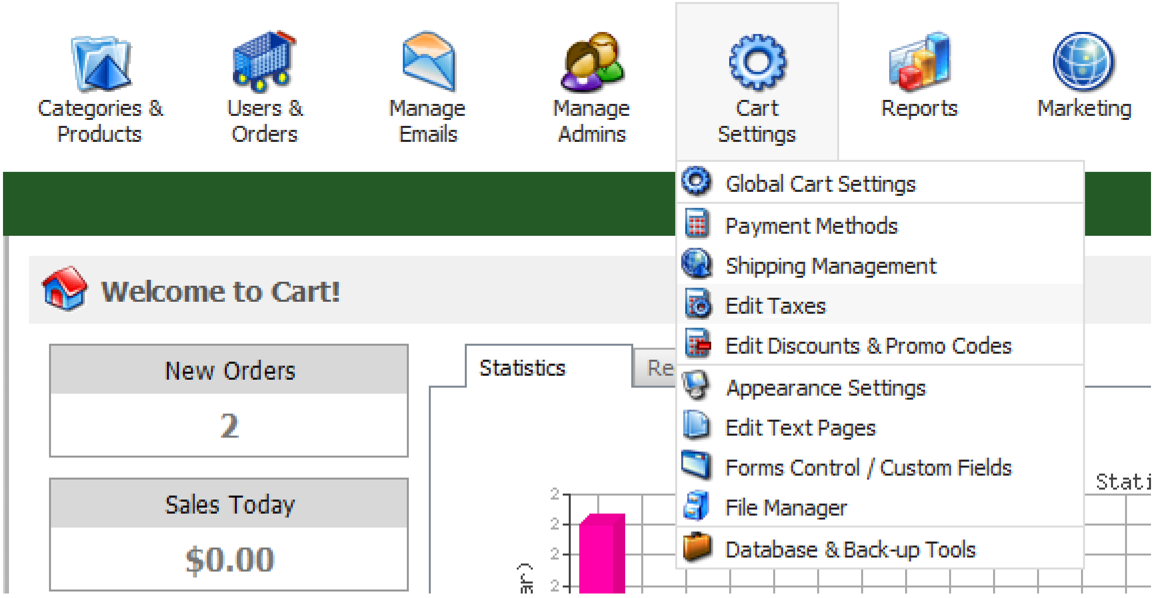


Figure 6-32-1: Advanced Taxes

2. Use Switch to Advanced Mode link to use the advance setting for taxes. This setting will give you more control over creating taxes.

3. Define settings for the tax you are creating under **'Edit Tax Settings'** tab.

4. **'Default Tax Country'** and **'Default Tax State'** are used to calculate taxes on product page(s) before user logs in for VAT as shown in figure 6-32-2

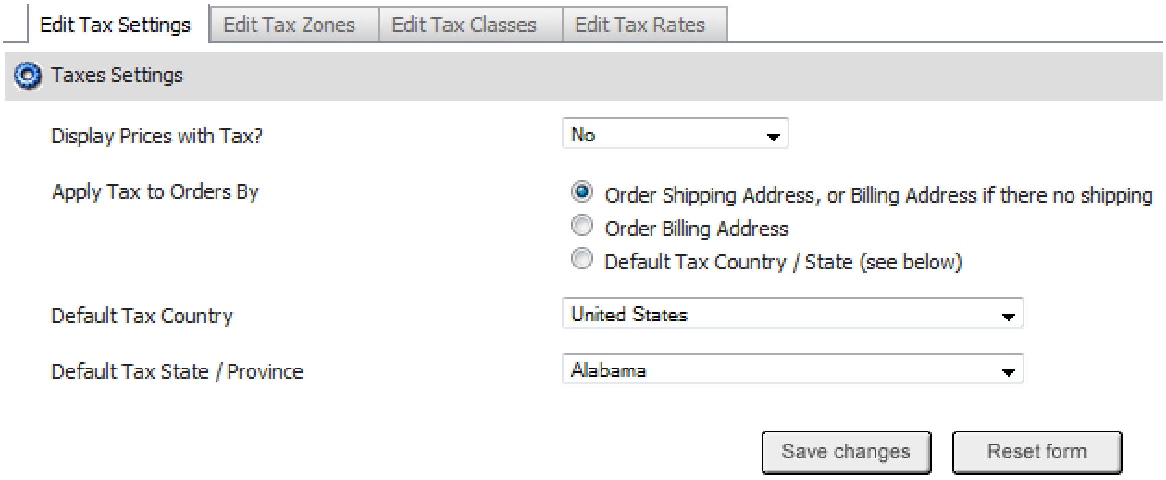


Figure 6-32-2: Advanced Taxes: Tax Settings

5. Add tax zone under **'Edit Tax Zones'** tab. Create a zone then click on pencil icon to add counties and states to the zone.

6. Please note that without defining the zone (counties and states details for zone) taxes will note work.

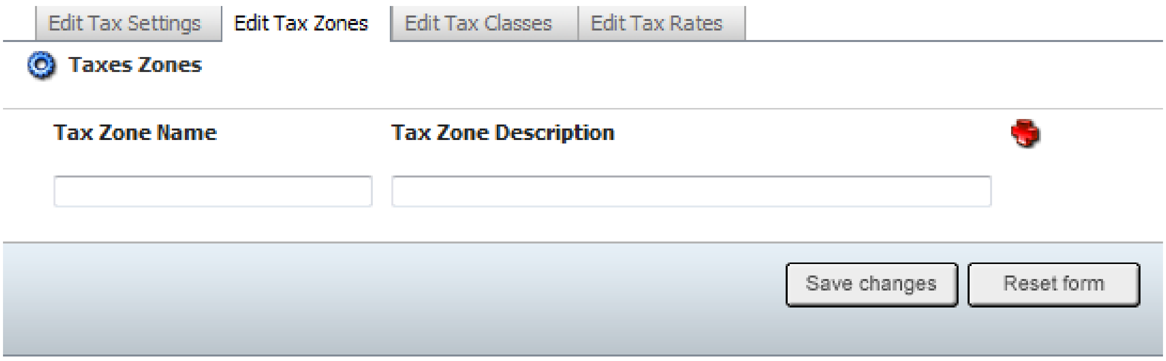


Figure 6-32-3: Advanced Taxes: Tax Zones

7. Add class under **'Edit Tax Classes'** tab. Class is nothing but group of product which you can use to define taxes. Classes allow you to apply different tax rate to different products. Create a class then click on pencil icon to add products to the class.

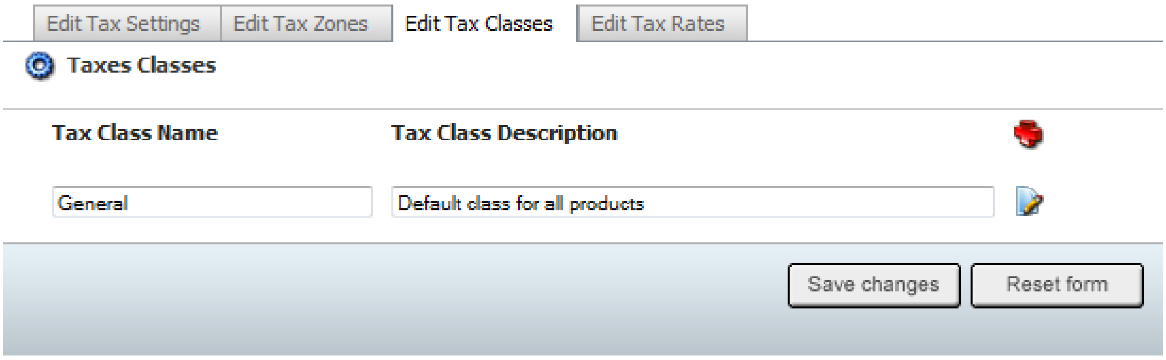


Figure 6-32-4: Advanced Taxes: Tax Classes

8. Final step is **'Edit Tax Rates'**. Click on **'Add a New Tax Rate'** link to add a tax rate to a zone. Choose appropriate zone and class for the rate.

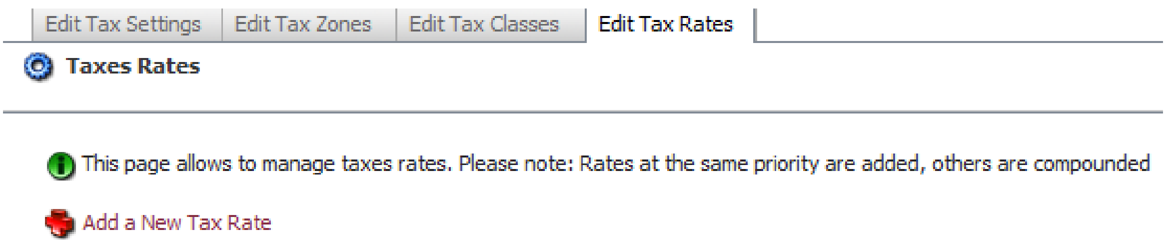


Figure 6-32-5: Advanced Taxes: Tax Rates

9. If tax is applicable for all site users then select all check boxes under '**Apply to'** section.

10. **'Apply to'** section allows you to define different tax for different type of users or eliminate any kind of user from tax rule.

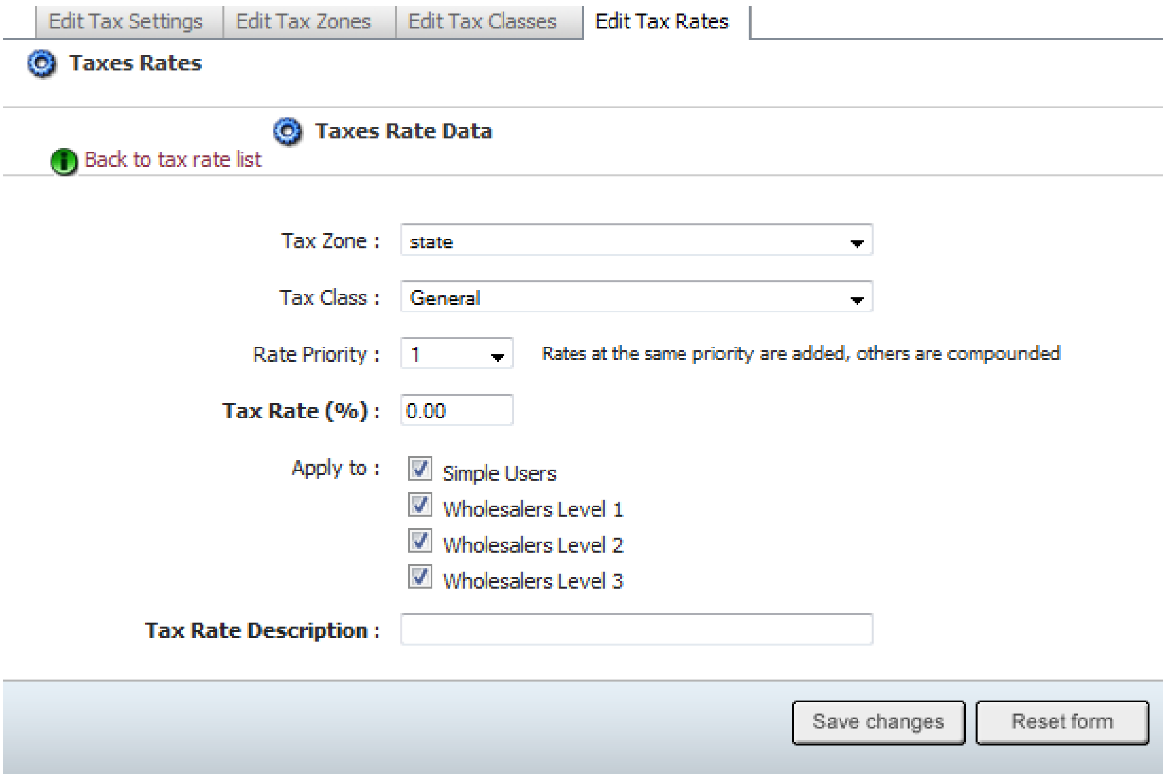


Figure 6-32-6: Advanced Taxes: Tax Rate Setup

11. After you complete this page, you should now have a working tax scheme setup.

***Note**, for any countries other than the US and Canada, you will have to populate your own countries list.

6.5 Edit Discounts

In this section, you can create various discount ranges for all purchases. The discount amount you set on Discounts page 188 are global for the cart and will be applied to all purchases.

Note: To set the individual discounts, go to Quantity Discounts 36 under Product (Insert) page 18 and enter the specific discount on a **product**.

To **edit discounts**, follow the steps:

1. Click **Edit Discounts & Promo Codes**, as shown in the Figure 6-33-1 below.

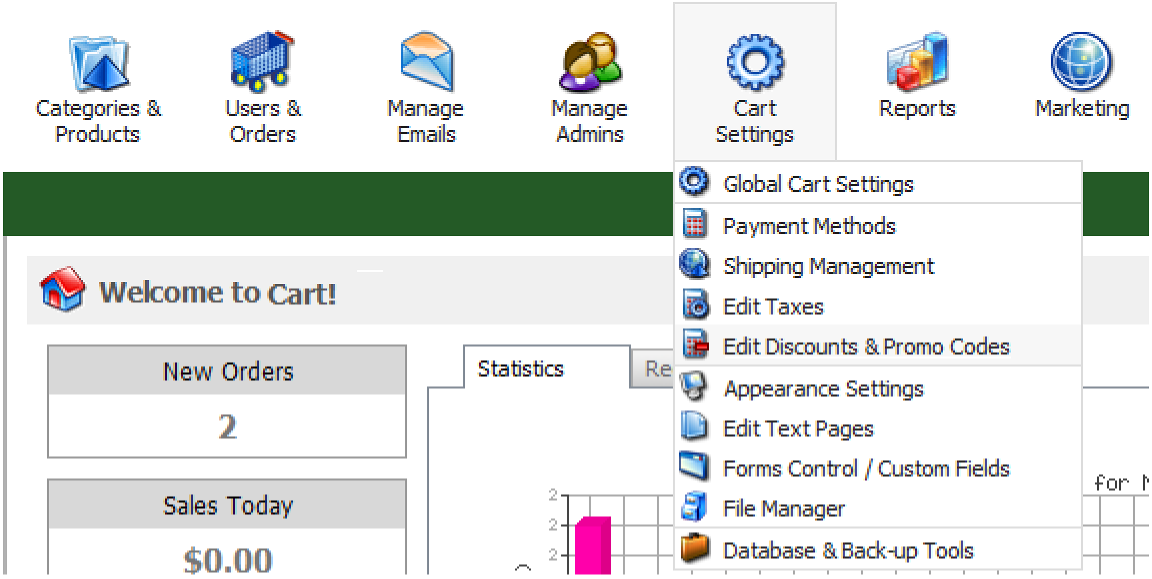


Figure 6-33-1: Edit Discounts

Discounts page opens, as shown in the Figure 6-33-2 188 below.

Note: You can also open the **Discounts** page directly by clicking on **Edit Discounts** link in the Admin Area Home page 8.

2. Under **Global Discounts**, you can select **Yes** from the **Use Global Discounts** drop down menu if you want to provide the discount globally, otherwise select **No**.
3. You cam create various discount range(s) for all the purchases by entering the **minimum amount**, **maximum amount** or **discount value** on the respective boxes. You can also select from the drop down menu that the discount value is in **%** or **USD**.

Note: The ranges for the discount amount (percentage or flat amount) should be set as an incentive for larger purchases. The ranges set should not overlap, as this will negate the desired discount given.

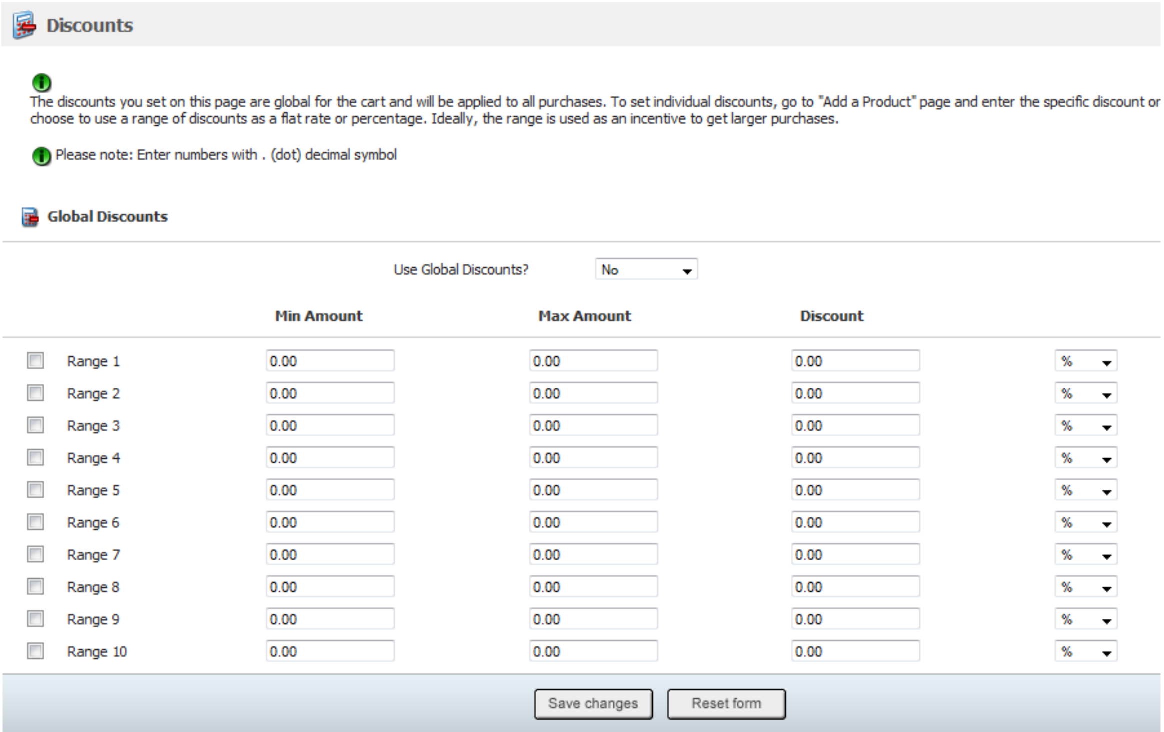


Figure 6-33-2: Discounts Page

4. If you want to cancel or start again, click on the **Reset form** button.
5. Click **Save changes** button to save details about the discounts.

6.6 Create Promo Codes

In this section, you can know how to add coupons or promo codes that can be provided to the users to get discounts on their orders.

To **add promo codes**, follow the steps:

1. Open 186 the **Discounts** page.

Note: You can also **enable** and **delete** the promo codes from the **Discounts** page. To know more about enabling 189 and deleting 190 the **promo codes**, click on each of the links.

2. In the **Discounts page**, scroll down to **Create a New Promo Code**, as shown in the Figure 6-34-1 189 below and enter the following information:
   a. **Campaign Name:** Enter the campaign name.
   b. **Promo Code:** Enter the code that can be provided to the users to get discounts.
   c. **Is it Active:** Select **Yes** from the drop down menu to make the promo code active, otherwise select **No**.
   d. **Start Date:** Select the **start date** for the promo codes to avail the

discount.

e. **Finish Date:** Select the **last date** for the promo codes to avail the discount.

f. **Discount:** Enter how much discount will be provided in this promo code and then select from the drop down menu it is in **%** or **USD**.

g. **Minimum order subtotal for this code:** Enter the minimum order to avail this code to get discounts.

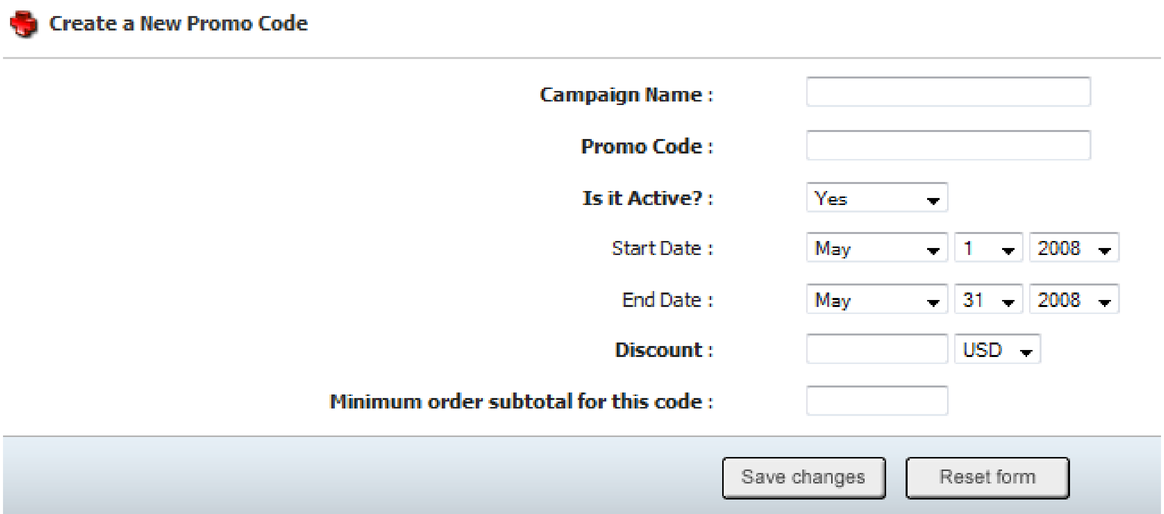


Figure 6-34-1: Create a New Promo Code

3. If you want to cancel or start again, click on the **Reset form** button.
4. Click **Save changes** button to add a promo code.

6.7 Enable Promo Codes

After creating a promo code, you can enable that promo code.

To **enable promo codes**, follow the steps:

1. Open 186 the **Discounts** page.
2. In the **Discounts** page, scroll down to **Promo Codes**, as shown in the Figure 6-35-1 189 below.
3. Under **Promo Codes**, select **Yes** from the drop down menu if you want to enable promo codes, otherwise select **No**.

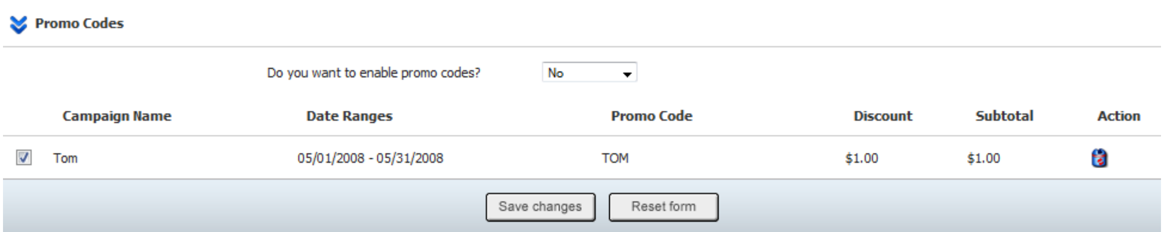


Figure 6-35-1: Promo Codes

4. If you want to cancel or start again, click on the **Reset form** button.
5. Click **Save changes** button to enable the promo code.

6.8 Delete Promo Codes

To **delete promo codes**, follow the steps:

1. Open 186 the **Discounts** page.
2. In the **Discounts** page, scroll down to **Promo Codes**.
3. Select the **Promo Codes** you want to delete by checking the box and click **Delete** icon.

A pop up appears asking for confirmation, as shown in the Figure 6-36-1 below.

Figure 6-36-1: Delete Confirmation

4. Confirm deletion process, by clicking **OK** button.

6.9 Appearance Settings Overview

This section is used for appearance settings. To know in detail about the following sections, click on the respective links below:

Change Site Colors 191
Edit Site Colors 193
Edit Site Layout 194
Catalog & Product Page Settings 198
Edit Site Headers Text and Images 202
Edit Site Buttons Text and Images 204
Edit Default Site Images 205
Edit Site Header and Footer 208
Edit Site Home Page 209
Edit Site Fonts 211

6.9.1 Change Site Colors

In this section, you can change the colors of your site by modifying the existing templates or by creating a new custom template.

To **change site colors**, follow the steps:

1. Click **Appearance Settings**, as shown in the Figure 6-37-1 below.

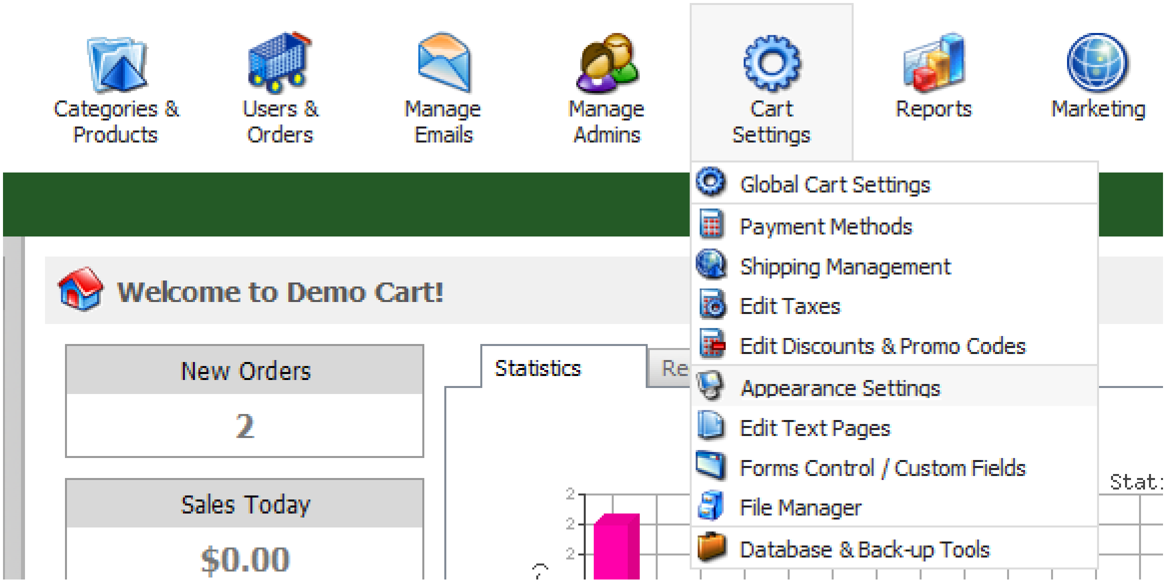


Figure 6-37-1: Appearance Settings under Cart Settings

2. **Appearance Settings** page will open, as shown in the Figure 6-37-2 191 below.

Note: You can also open the **Appearance Settings** page directly by clicking on **Appearance Settings** link in the Admin Area Home page 8.

In the **Appearance Settings** page, you can also adjust the Edit Site Colors 193, Edit Site Layout 194, Catalog & Product Page Settings 198, Edit Site Headers Text and Images 202, Edit Site Buttons Text and Images 204, Edit Default Site Images 205, Edit Site Header & Footer 208, Edit Site Home Page 209 and Edit Site Fonts 211.

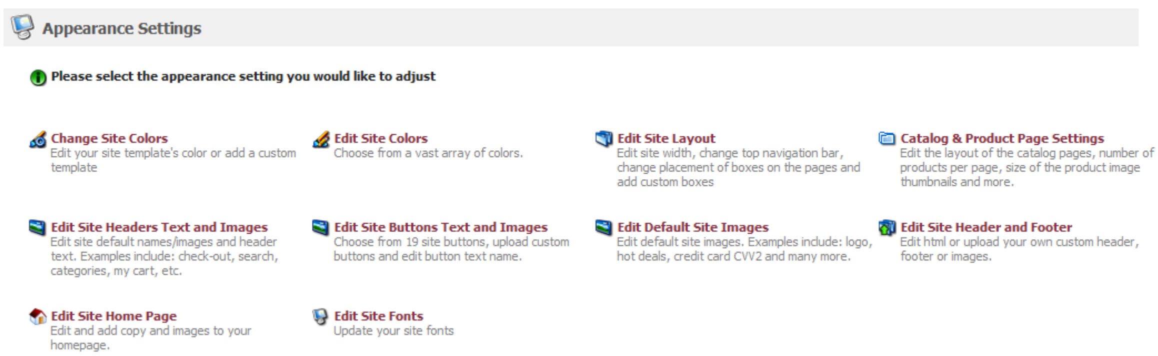


Figure 6-37-2: Appearance Settings Page

3. Click **Change Site Colors** link in the **Appearance Settings** page.

Site Color Templates page opens, as shown in the Figure 6-37-3 192 below.

4. To **create your own new custom template** for changing the site colors, select the color template that closely matches the colors you want from **Select a Color Template** drop-down menu under **Choose a color template**.
5. Under **Create a New Template**, select **Yes** from the drop down menu for " **Do You Want To Create A Custom Color Template**".
6. **Enter** the **name** of the **new color template** you would like to create.
7. Click **Save changes** button to add it to the existing color templates drop down menu. You will be taken to **edit site colors** page, where you can further define the colors of your template. To know more, go to Edit Site Colors 193.

Note: You can also **edit an existing template** in the Site Color Templates page 192 for changing the site colors. Select an existing template from **Select a Color Template** drop-down menu under **Choose a color template** and then clicking **Edit current template** link. You will be taken to **edit site colors** page, where you can edit the colors of your existing template. To know more, go to Edit Site Colors 193.

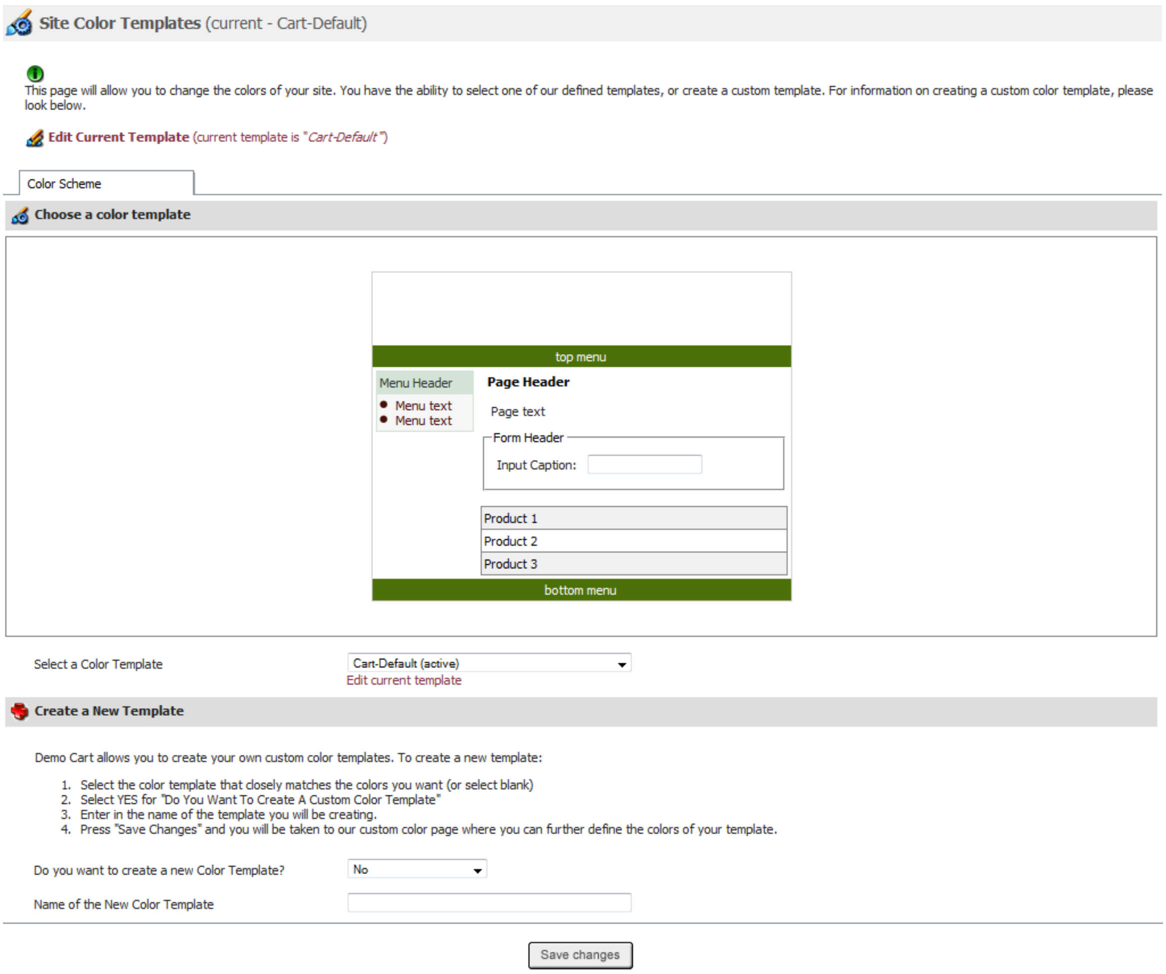


Figure 6-37-3: Site Color Templates

8. After **creating a new custom template** or **editing an existing template**, select the new or updated color template from **Select a Color Template** drop-down menu under **Choose a color template**.
9. Click **Save changes** button to make it the active template and change the site colors.

6.9.2 Edit Site Colors

In this section, you can edit site colors.

To **edit site colors**, follow the steps:

1. Open 191 the **Appearance Settings** page.
2. Click **Edit Site Colors** in the **Appearance Settings** page.

Edit Site Colors page opens, as shown in the Figure 6-38-1 194 below.

Note: Click **Preview Site** link on top of the Edit Site Colors page 194 to view the site how it looks.

3. Click the **edit** icon in **Edit Site Colors** page to customize the colors of the respective sections (i.e. **Body**, **Site**, **Bars**, **Box**, **Page**, **Catalog** and **Form**) in the Figure 6-38-1 below.

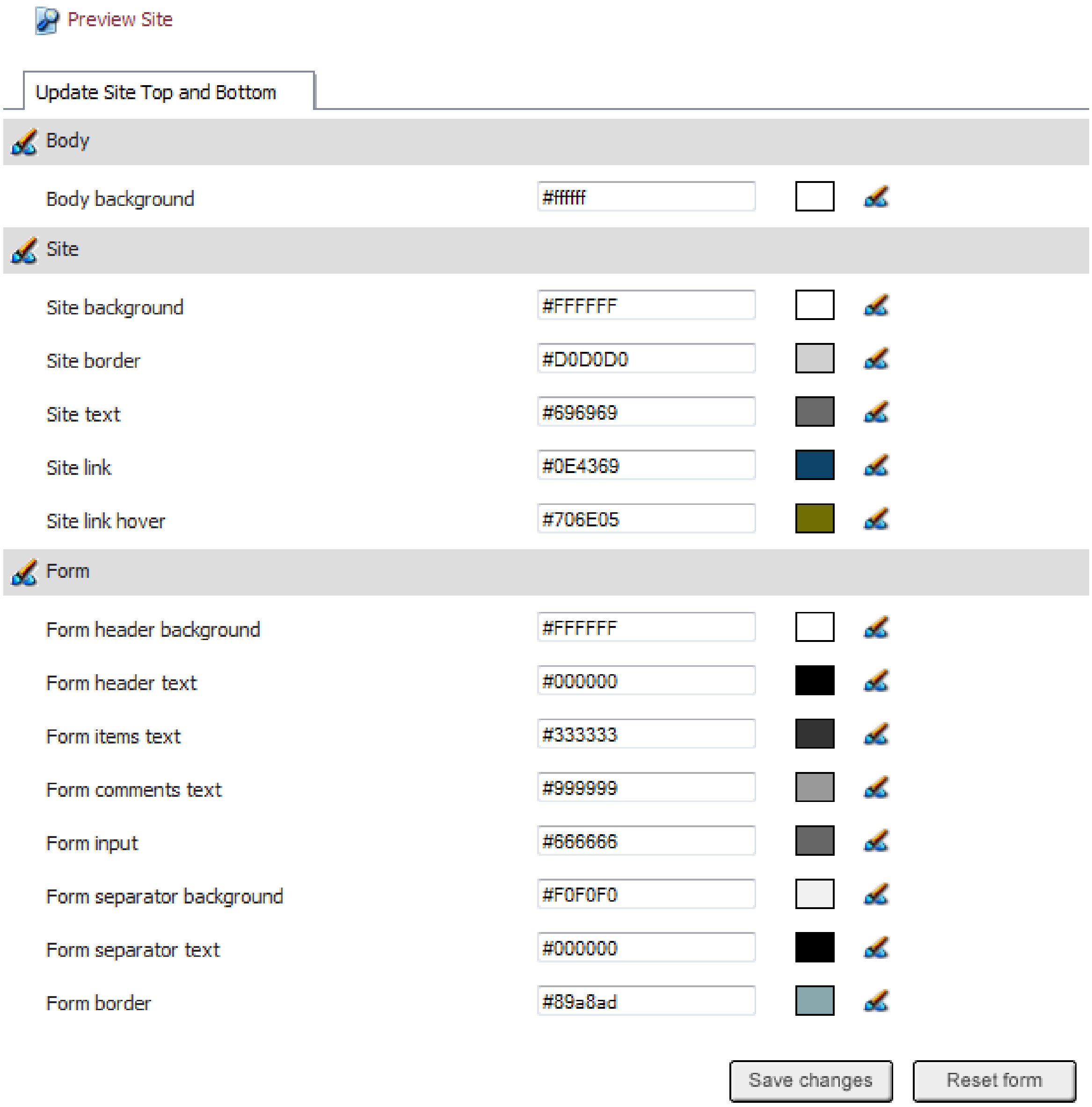


Figure 6-38-1: Edit Site Colors Page

4. If you want to cancel or start again, click on **Reset form** button.
5. Click **Save changes** button to update the site colors.

6.9.3 Edit Site Layout

In this section you can edit site width, change top navigation bar settings, change placement of boxes on the pages and add custom boxes.

To **edit site layout**, follow the steps:

1. Open 191 the **Appearance Settings** page.
2. Click **Edit Site Layout** in the **Appearance Settings** page.

Site Layout page opens.

3. **Site Width & Align:** Select the site width & align by clicking on the respective radio button, as shown in the Figure 6-39-1 below.

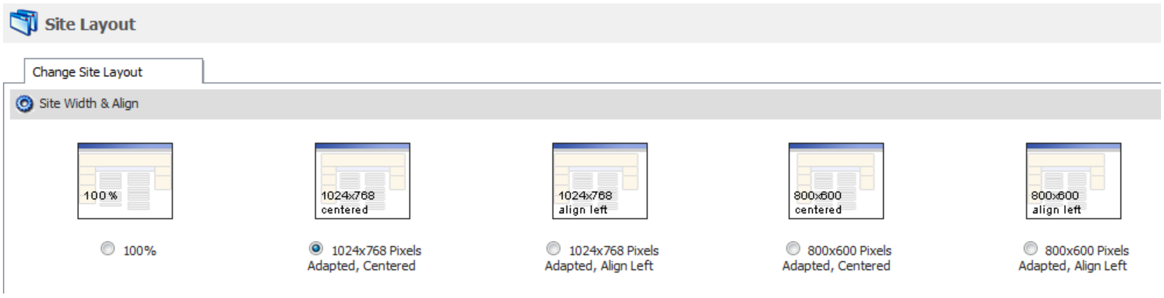


Figure 6-39-1: Site Width & Align

4. **Top Bar Settings:** Decide the height of the Top Bar and will it be visible. Enter the following information, as shown in the Figure 6-39-2 below:
   a. **Is Top Bar Visible:** Select **Yes** from the drop down menu to make the **Top Bar** visible.
   b. **Top Bar Height (pixels):** Enter the **Top Bar Height** in pixels.
   c. **Checkout Controls Location:** Select the checkout controls location (i. e. **Top Bar** or **Over Top Bar**) from the drop-down menu.

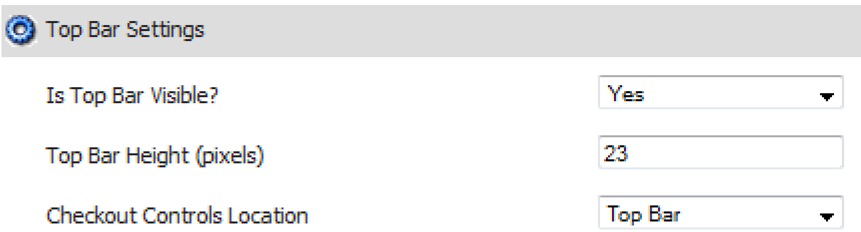


Figure 6-39-2: Top Bar Settings

5. **Box Settings:** Here you can customize the settings of the boxes. Enter the following information, as shown in the Figure 6-39-3 196 below:
   a. **Hide boxes on checkout pages:** Select **Yes** from the drop down menu to hide boxes on checkout pages, otherwise select **No**.
   b. **Hide right side on fixed-width carts:** Select **Yes** from the drop down menu to auto-hide right side boxes on the Catalog, Cart & Project information pages, otherwise select **No**.
   c. **Boxes width (pixels):** Enter the box width in pixels.
   d. **Boxes Header Text Align:** Select the box header text alignment (Center, Left or Right) from the drop-down menu.
   e. **Category Menu:** Select **Right** or **Left** from the drop down menu, wherever you want **Category Menu** box to be displayed and also select the **Priority** from the drop down menu. You can select this on a scale of 1 to 10, where 1 is given the highest priority.
   f. **My Cart:** Select **Right** or **Left** from the drop down menu, wherever

you want **My Cart** box to be displayed and also select the **Priority** from the drop down menu. You can select this on a scale of 1 to 10, where 1 is given the highest priority.

g. **Best Sellers:** Select **Right** or **Left** from the drop down menu, wherever you want **Best Sellers** box to be displayed and also select the **Priority** from the drop down menu. You can select this on a scale of 1 to 10, where 1 is given the highest priority.

h. **Search:** Select **Right** or **Left** from the drop down menu, wherever you want **Search** box to be displayed and also select the **Priority** from the drop down menu. You can select this on a scale of 1 to 10, where 1 is given the highest priority.

i. **Subscribe:** Select **Right** or **Left** from the drop down menu, wherever you want **Subscribe** box to be displayed and also select the **Priority** from the drop down menu. You can select this on a scale of 1 to 10, where 1 is given the highest priority.

j. **Recent Items:** Select **Right** or **Left** from the drop down menu, wherever you want **Recent Items** box to be displayed and also select the **Priority** from the drop down menu. You can select this on a scale of 1 to 10, where 1 is given the highest priority.

k. **Manufacturers:** Select **Right** or **Left** from the drop down menu, wherever you want **Manufacturers** box to be displayed and also select the **Priority** from the drop down menu. You can select this on a scale of 1 to 10, where 1 is given the highest priority.

Note: Please click here to edit boxes headers link below **Box Settings** in **Site Layout** page to open **Edit Site Headers** page. To know more about **edit site headers**, click here 202.

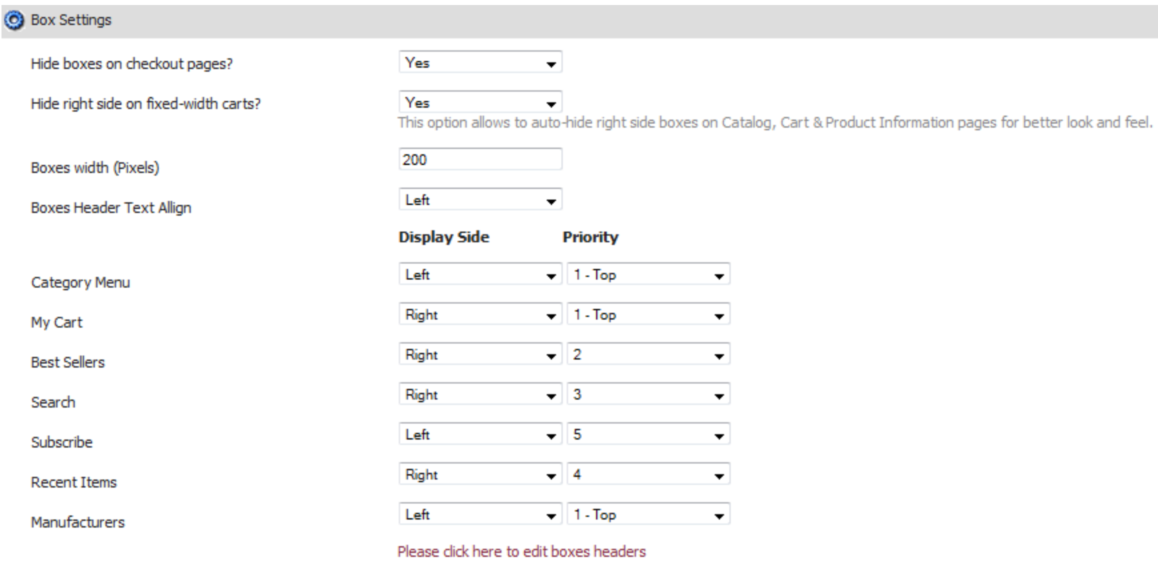


Figure 6-39-3: Box Settings

Custom Boxes Settings: Here you can **Add**, **Edit** or **Delete Custom boxes**.

6. To **Add A New Box**. Click **Add a New Box** link in **Custom Boxes Settings**, as shown in the Figure 6-39-4 below.

Figure 6-39-4: Custom Boxes Settings

The **Site Box (insert)** page will open. Here, you can add a custom box to Springboard Promocart.

Note: Click on **Click here to edit Appearance Settings (Default Images, Layout and Colors)** link to open Appearance Settings page 191.

7. **Common Box Properties:** Enter the following information, as shown in the Figure 6-39-5 197 below:
   a. **Box Name:** Enter the **box name** to easily identify a box in admin area.
   b. **Header Text or HTML:** Enter the header text.
   c. **Box Side/Visibility:** Select **Right** or **Left** from the drop down menu, wherever you want the box side visible. You can also select **Invisible** to hide it.
   d. **Priority:** Priority is used for sorting. You can select this on a scale of 1 to 10 from the drop down menu, where 1 is given the highest priority.

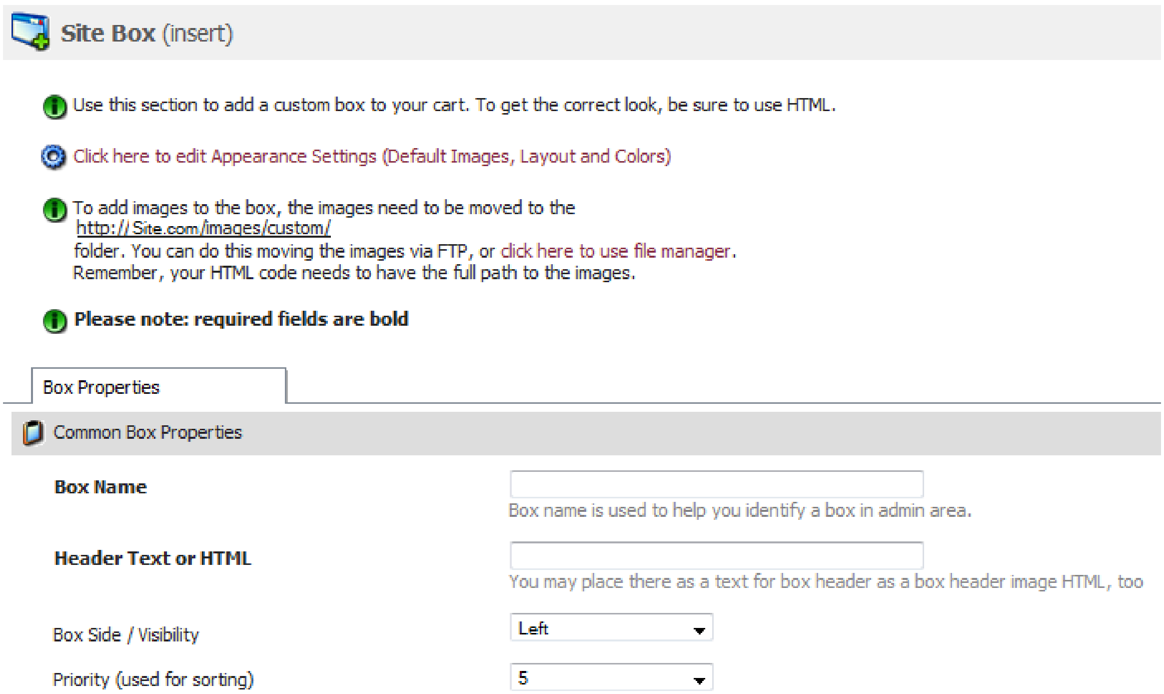


Figure 6-39-5: Common Box Properties

8. **Box HTML:** Enter text in the **Box HTML** box.

Figure 6-39-6: Box HTML

9. You can also create an eye-catching description by clicking **Edit HTML Online** in **Box HTML**.
10. If you want to cancel or start again, click on the **Reset form** button.
11. Click **Save changes** button to save details about adding a box.
12. To **Edit a Box**, click on **Edit** icon under **Custom Boxes Settings** in **Site Layout** page. The **Site Box (update)** page opens, where you can edit all the parameters. After editing, click **Save changes** button to update.
13. To **Delete a Box**, click on **Delete** icon under **Custom Boxes Settings** in **Site Layout** page. A confirmation pop up appears, click **OK** button to delete the box.
14. If you want to cancel or start again, click on **Reset form** button.
15. Click **Save changes** button to update the site layout settings.

6.9.4 Catalog & Product Page Settings

This section is used to enter catalog information. It allows you to setup catalog and product page views. You can also manage the number of products per page, size of the product image thumbnails and more.

To do **catalog settings**, follow the steps:

1. Open 191 the **Appearance Settings** page.
2. Click **Catalog & Product Page Settings** in the **Appearance Settings** page.

Catalog Settings page opens.

Note: By default, the **Catalog Settings** page opens under **Catalog Page Views** tab, as shown in the Figure 6-40-1 199 below.

To set **catalog page views**, follow the steps:

3. Under **Catalog Page Views** tab, select the **Catalog Views** and enter the

Catalog Settings.

4. **Catalog Views:** Select the **catalog view available** by clicking on the respective check box, as shown in the Figure 6-40-1 below. Also, select the view, which will be active by default by clicking on the radio button.

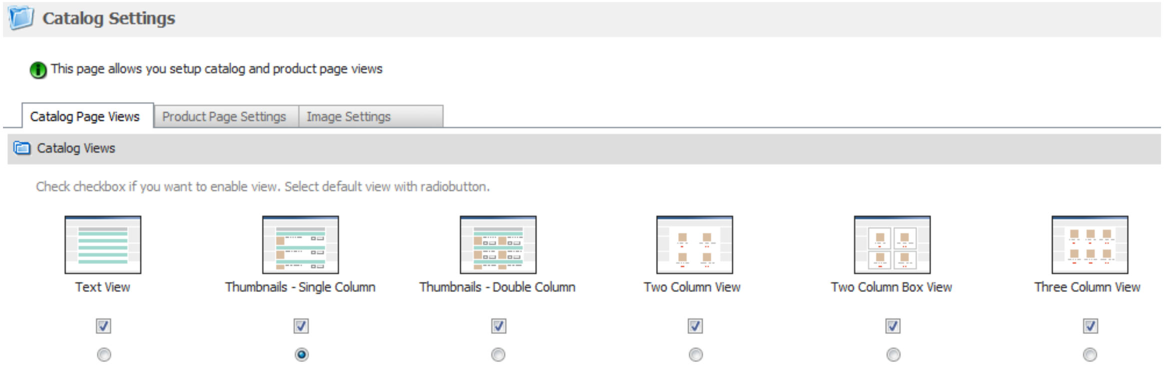


Figure 6-40-1: Catalog Views

5. **Catalog Settings:** Enter the following information, as shown in the Figure 6-40-2 199 below:
   a. **List Products By:** Select sort order of product list from the drop down menu. By default, Priority is selected.
   b. **Products per Page:** Enter the number of products to be displayed per page. If you are displaying **thumbnail images**, it is advisable to keep the number below 30 so that the customers can easily view the page.
   c. **Pages Number in Navigation Bar:** Enter the number of page links that will be listed in **Catalog Navigation Bar**.
   d. **Replace Catalog With Alternative Navigation**: Select **Yes** from the drop-down menu to Replace catalog with alternative navigation. It will hide the menu on **Cart**, **Shipping** and **Invoice** page and will only show the catalog. On the other hand, selecting **No** will not replace catalog with alternative navigation.
   e. **Display subcat products in primary category:** Select **Yes** from the drop down menu to display subcategory products in primary category. Selecting **No** won't display subcategory products in primary category.
   f. **Display Products ID on catalog pages:** Select **Yes** to display product ID on catalog pages along with the product. On the other hand, selecting **No** will hide the product ID on catalog pages along with the product.

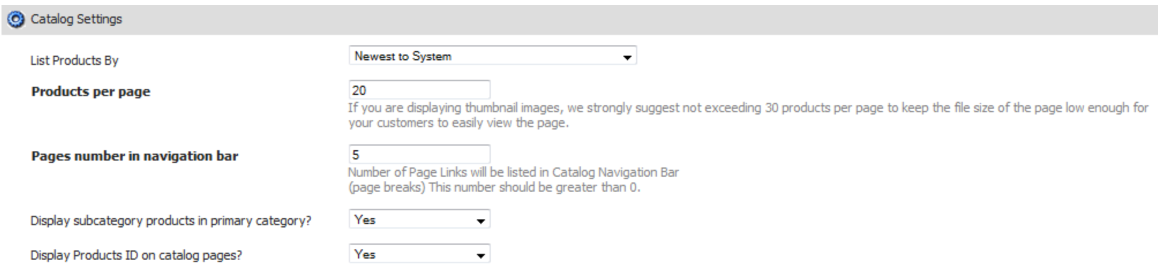


Figure 6-40-2: Catalog Settings

6. If you want to cancel or start again, click on **Reset form** button.
7. Click **Save changes** button to save the catalog page views.
8. Here you can set up your price ranges so when viewing a particular category you can sort by the defined price ranges as shown in Figure 6-40-3

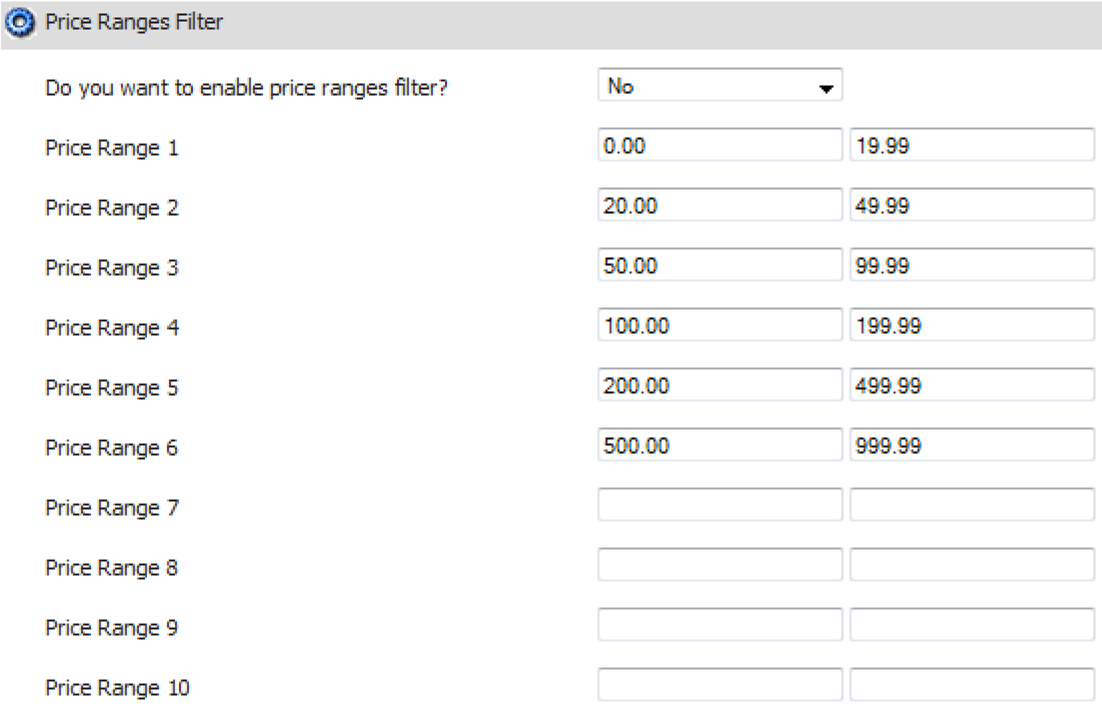


Figure 6-40-3: Price Range Filters

For **product page settings**, follow the steps:

1. Click **Product Page Settings** tab in the **Catalog Settings** page.
2. Enter the following information, as shown in the Figure 6-40-4 201 below:
    a. **Choose page style:** Choose a style from existing page style templates.
    b. **Recommended Product View:** Select how the product will be displayed on product page from the drop-down menu.
    c. **Recommended Products on Product Page:** Select the number of recommended products to be displayed on product page from the drop-down menu.
    d. **Send Email to a Friend As:** Select the format (**HTML** or **Text**) of the email if a customer wants to notify a friend about a product through email. You can also disable this feature by selecting **Feature Disabled** from the drop-down menu.
    e. **Image Zooming:** Select 'Zoom', 'Magnify' or 'None' Depending on the affect you want to give on your product images on the product page.

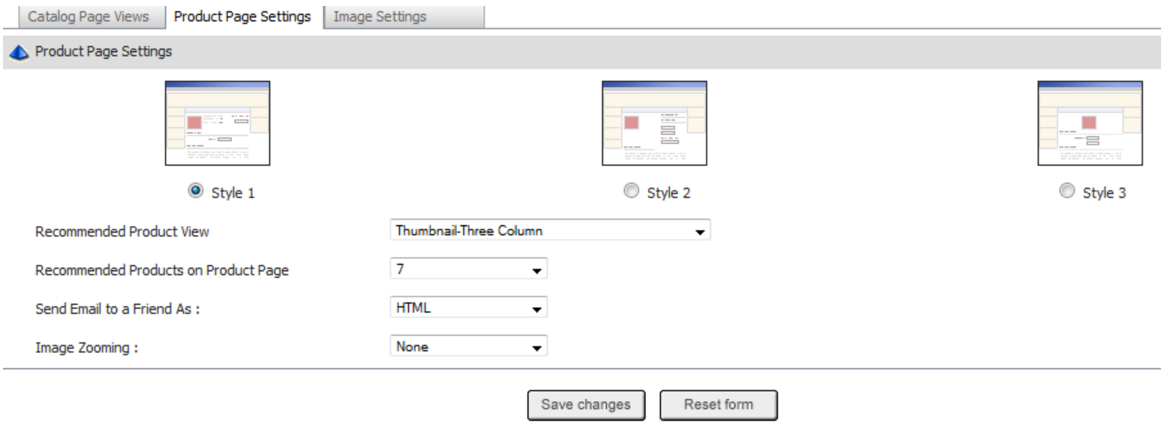


Figure 6-40-4: Product Settings Page

3. If you want to cancel or start again, click on the **Reset form** button.
4. Click **Save changes** button to save the product page settings.

For **Image settings**, follow the steps:

1. Click **Image Settings** tab in the **Catalog Settings** page.
2. Enter the following information, as shown in the Figure 6-40-5 201 below:
   a. **Thumbnail image size:** Set **Catalog image thumbnail size**, in pixels. It is recommended to have the image size between 50 and 120 pixels.
   b. **Thumbnail Image Type:** Select the Products image thumbnail type from the drop-down menu.
   c. **Image on product page size:** Set the **Products image thumbnail size**, in pixels. It is recommended to have the image size between 200 and 400 pixels.
   d. **Image on Product Page Image Type:** Select the image type on Product page from the drop-down menu.

Note: If you make a change to image sizes, you will need to regenerate thumbnails using the Thumbnail Generator 49.

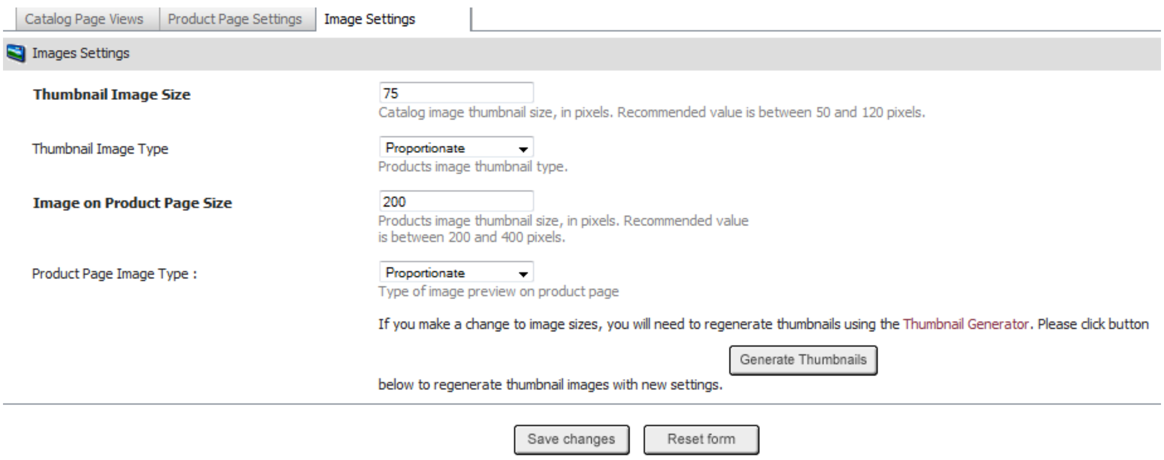


Figure 6-40-4: Image Settings Page

3. If you want to cancel or start again, click on the **Reset form** button.
4. Click **Save changes** button to save the image settings.

6.9.5 Edit Site Headers Text and Images

This section will allow you to upload site default names/images and header text such as Checkout, Search, Categories, My Cart, etc. You can also choose the header set from the 15 pre-defined sets.

To **edit site headers text and images**, follow the steps:

1. Open 191 the **Appearance Settings** page.
2. Click **Edit Site Headers Text and Images** in the **Appearance Settings** page.

Edit Site Headers page opens.

3. **Header Set:** Select **Header Set** from the **Pre-defined Custom Header Set** drop down menu and click **Use This Set** button to use this header set with Active Language, as shown in the Figure 6-41-1 below.

Note: You can view the header set automatically in front of **Preview** as soon as you select it in **Pre-defined Custom Header Set** drop down menu.

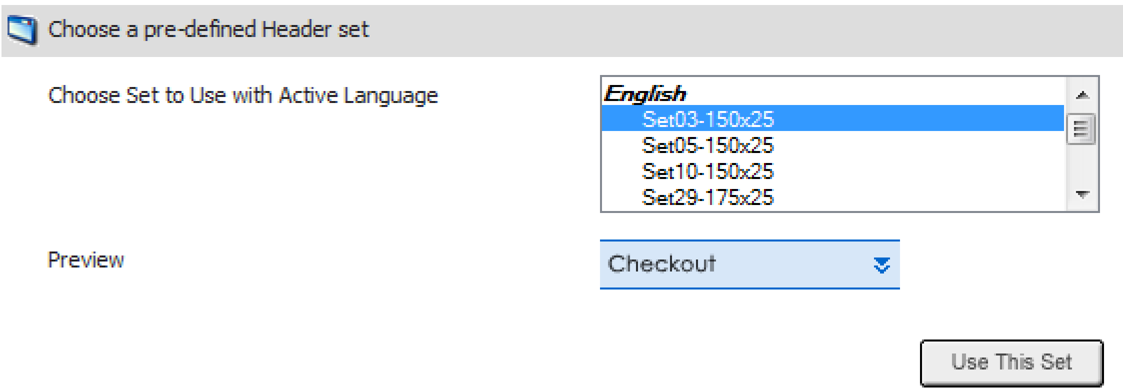


Figure 6-41-1: Header Set

4. Select the language from **Choose language to edit** drop down menu under **Current Headers Set**.
5. Enter header text in the **Caption box** and click **Browse** of the respective sections to upload the image (image types are **JPG**, **GIF** and **PNG**) in **Edit Site Headers** page, as shown in the Figure 6-41-2 below.

Note: You can remove a particular image by clicking on **Delete This Image** link

under **Current Headers Set**. A pop up appears asking for confirmation. Click **OK** button.

You can also **Delete All Images** at once by clicking on **Delete All Images** link under **Current Headers Set** in the bottom of the **Edit Site Headers** page**.** A pop up appears asking for confirmation. Click **OK** button.

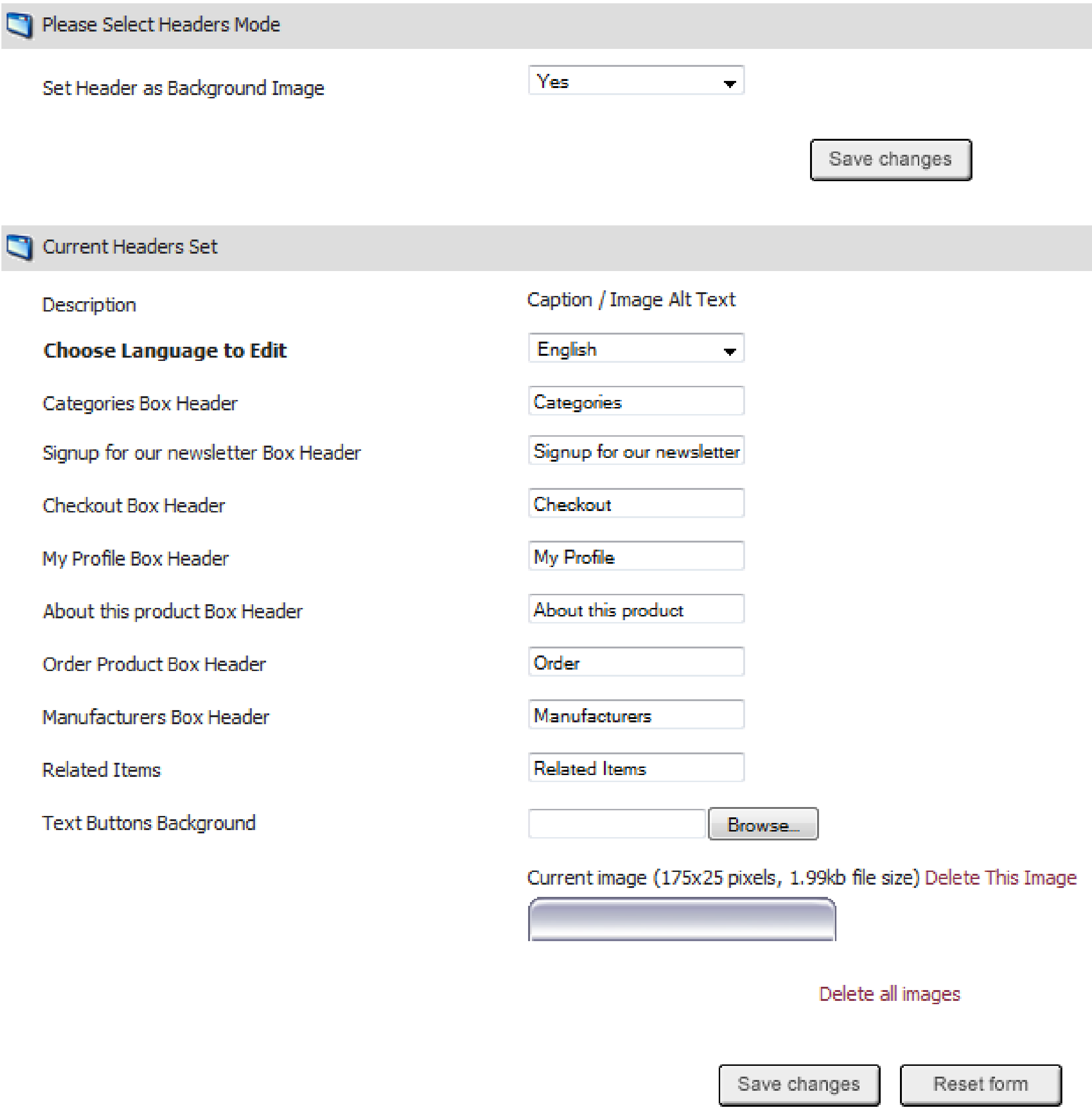


Figure 6-41-2: Edit Site Headers Page

6. If you want to cancel or start again, click on **Reset form** button.
7. Click **Save changes** button to upload your headers to the cart.

6.9.6 Edit Site Buttons Text and Images

This section will allow you to upload custom buttons to Springboard Promocart and edit button text name. You can also choose the button from the 19 pre-defined site buttons.

To **edit site buttons text and images**, follow the steps:

1. Open 191 the **Appearance Settings** page.
2. Click **Edit Site Buttons Text and Images** in the **Appearance Settings** page.

Edit Site Buttons page opens.

3. **Button Set:** Select **Button Set** from the **Pre-defined Custom Button Set** drop down menu and click **Use This Set** button to use this button set, as shown in the Figure 6-42-1 below.

Note: You can view the button set automatically in front of **Preview** as soon as you select it in **Pre-defined Custom Button Set** drop down menu.

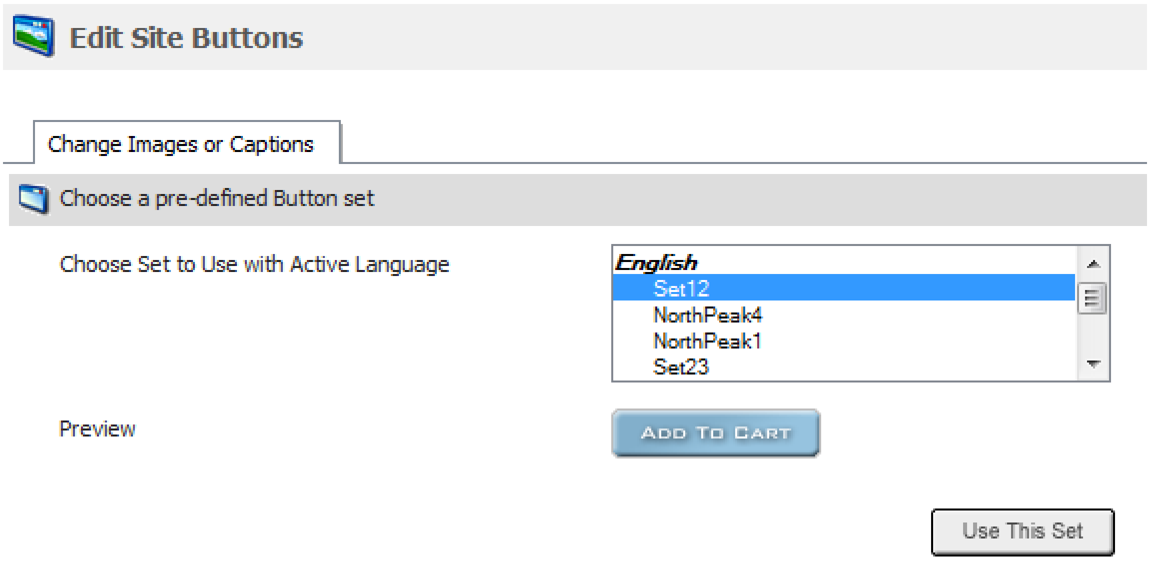


Figure 6-42-1: Button Set

4. Select the language from **Choose language to edit** drop down menu under **Current Buttons Set**.
5. Enter button caption in the **Caption box** or click **Browse** of the respective sections to upload the image (image types are **JPG**, **GIF** and **PNG**) in **Edit Site Buttons** page, as shown in the Figure 6-42-2 below.

Note: You can **Delete All Images** at once by clicking on **Delete All Images** link under **Current Buttons Set** in the bottom of the **Edit Site Buttons** page. A pop up appears asking for confirmation. Click **OK** button.

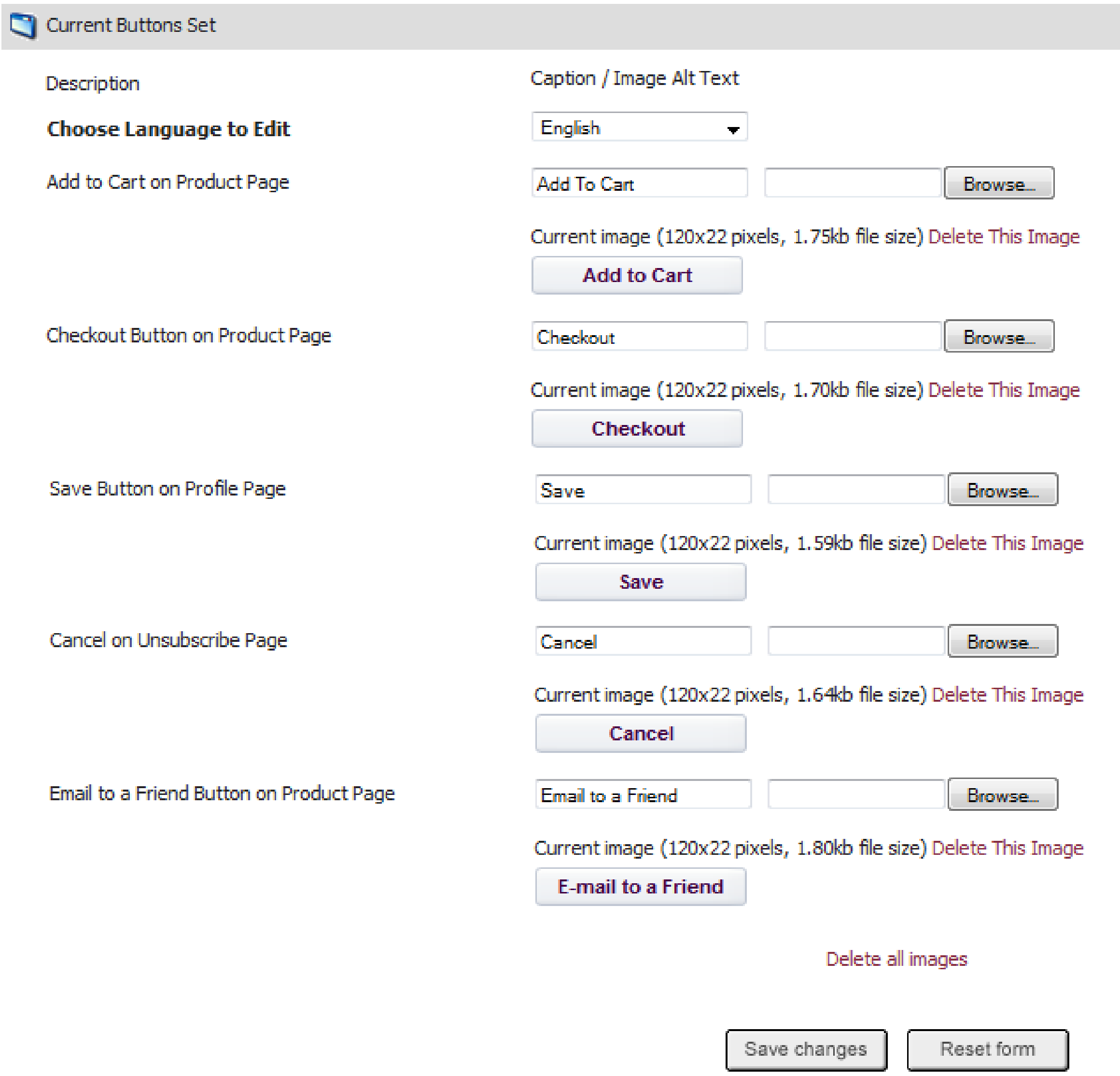


Figure 6-42-2: Edit Site Buttons Page

6. If you want to cancel or start again, click on **Reset form** button.
7. Click **Save changes** button to upload your buttons to the cart.

6.9.7 Edit Default Site Images

This section helps you in editing default site images such as logo, hot deals, credit card CVV2 and many more. In addition, you can also change their text.

To **edit default site images**, follow the steps:

1. Open 191 the **Appearance Settings** page.
2. Click **Edit Default Site Images** in the the **Appearance Settings** page.

Edit Default Site Images page opens, as shown in the Figure 6-43-1 207 below.

3. Select **Image Set** from the **Pre-defined Image Set** drop down menu and click **Use This Set** button to use this image set, as shown in the Figure 6-43-1 207 below.

Note: You can view the image set automatically in front of **Preview** as soon as you select it in **Pre-defined Image Set** drop down menu.

4. Select the language from **Choose language to edit** drop down menu under **Current Images Set**.
5. Enter images caption in the **Caption box** or click **Browse** of the respective sections to upload the image (image types are **JPG**, **GIF** and **PNG**) in **Edit Default Site Images** page, as shown in the Figure 6-43-1 207 below.

Note: Under **Current Images Set**, click **Delete This Image** link for the image that you want to remove from Springboard Promocart. A pop up appears asking for confirmation. Click **OK** button.

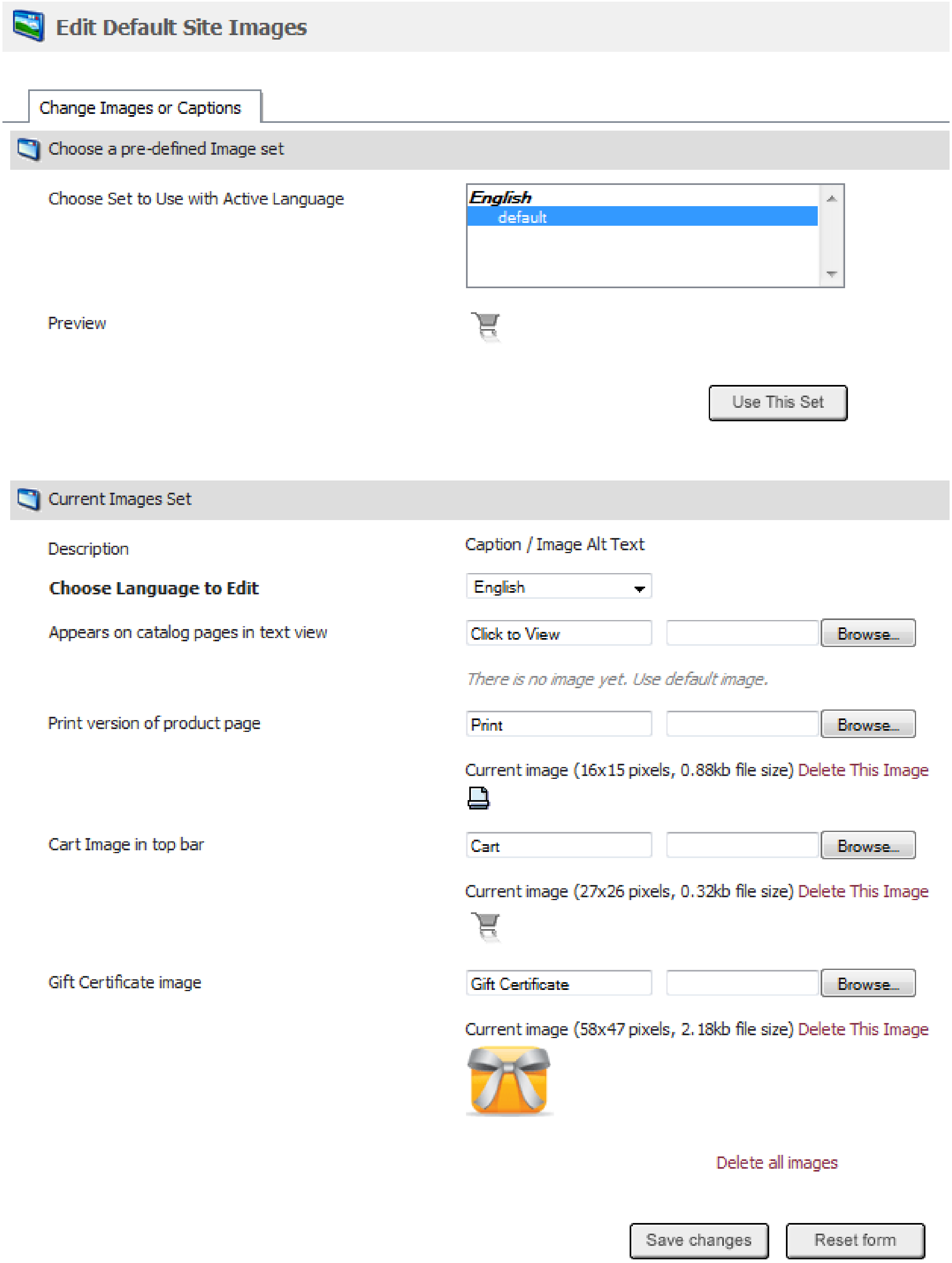


Figure 6-43-1: Edit Default Site Image Page

Note: You can **Delete All Images** at once by clicking on **Delete All Images** link under **Current Images Set** in the bottom of the **Edit Default Site Images** page. A pop up appears asking for confirmation. Click **OK** button.

6. If you want to cancel or start again, click on **Reset form** button.
7. Click **Save changes** button to upload your images to the cart.

6.9.8 Edit Site Header and Footer

This section allows you upload your own custom header, footer or images. To get the correct look, be sure to use HTML.

To go to **site top & bottom**, follow the steps:

1. Open 191 the **Appearance Settings** page.
2. Click **Edit Site Header and Footer** in the **Appearance Settings** page.

Site Top & Bottom page opens, as shown in the Figure 6-44-1 209 below.

Note: Click on **Load Your Company Logo and other images** link to open **Edit Default Site Images** page. To know more about **Edit Default Site Images**, click here 205.

3. **Site Top & Bottom Page:** Enter the following information:
   a. **Page Top HTML:** Enter your site page headers in HTML.
   b. **Page Bottom HTML:** Enter your site page footers in HTML.

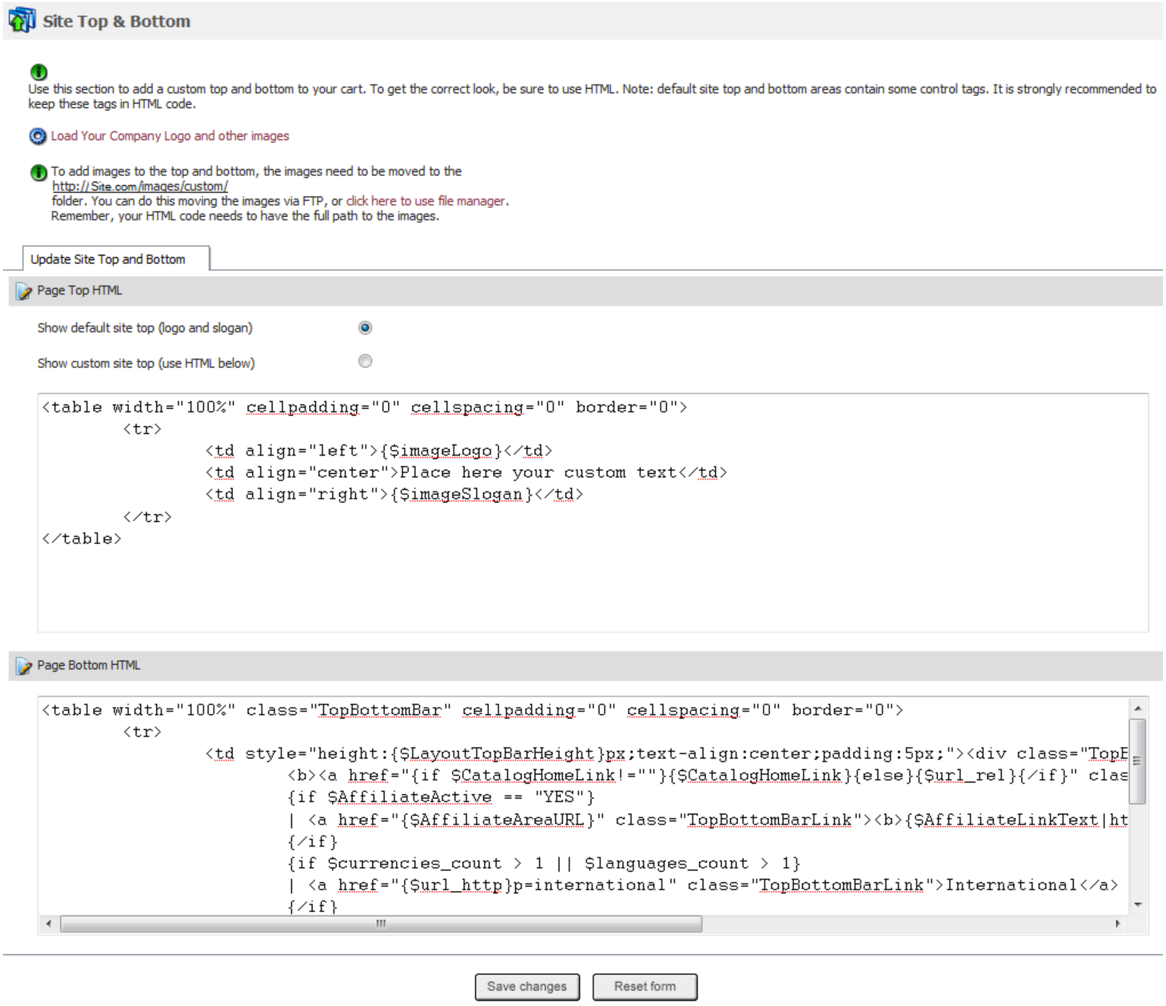


Figure 6-44-1: Site Top & Bottom page

4. You can also create an eye-catching description by clicking **Edit HTML Online** in **Page Top and Bottom HTML**.
5. If you want to reset the form, click on the **Reset form** button.
6. Click **Save changes** button to save details about the Site Top & Bottom.

6.9.9 Edit Site Home Page

This section allows you to add/edit a custom content to Springboard Promocart home page. To get the correct look, be sure to use HTML.

To go to **site home** page, follow the steps:

1. Open 191 the **Appearance Settings** page.
2. Click **Edit Site Home Page** in the **Appearance Settings** page.

Site Home Page opens, as shown in the Figure 6-45-1 210 below.

Note: Click **Load home page center image and other images** link to open **Edit Default Site Images** page. To know more about **Edit Default Site Images**, click here 205.

3. **Site Home Page:** Enter the following information:
   a. **Home Page HTML:** Enter the HTML to be used for your site page headers.
   b. **Home Page Settings:** Choose the view you would like to be used to display product items on Home Page, or disable products displaying by selecting **No products on Home Page** from the **Choose a View** drop down menu. You can also decide the number of product to be displayed on Home Page, by default it is 10 and enter the URL with which the Home Page is linked. By default, it is index.php?p=home.

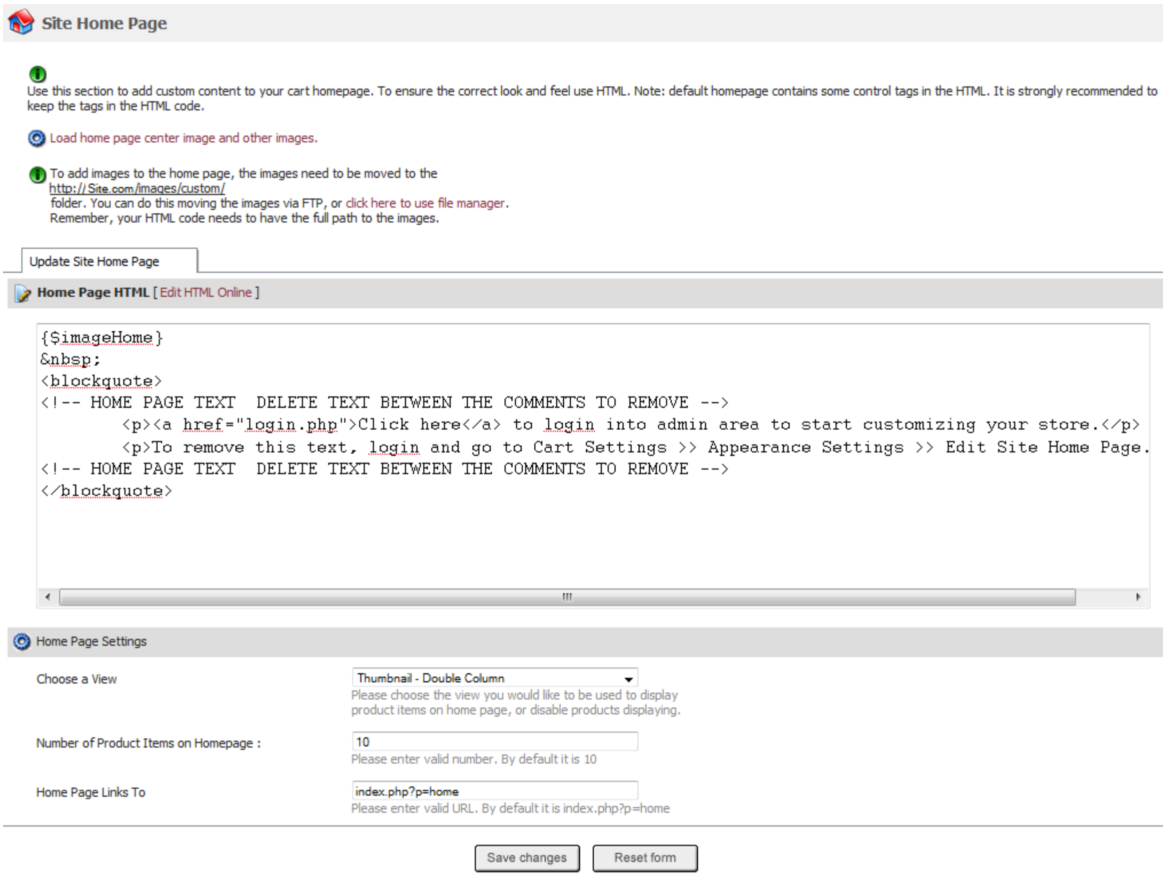


Figure 6-45-1: Site Home Page

4. You can also create an eye-catching description by clicking **Edit HTML Online** under **Home Page HTML** in **Site Home Page**.
5. If you want to reset the form, click on the **Reset form** button.
6. Click **Save changes** button to save details about the Site Home Page.

6.9.10 Edit Site Fonts

This section allows you to update your site fonts used in your store style sheet. For easy or advanced editing choose edit mode below.

To **update your site fonts**, follow the steps:

1. Open 191 the **Appearance Settings** page.
2. Click **Edit Site Fonts** in the **Appearance Settings** page.

Site Fonts page opens, as shown in the Figure 6-46-1 below.

Note: By default, **Site Fonts** page opens under **Simple mode**. You can also change it to advance mode by clicking **Switch to Advanced Mode** link.

3. You can **edit** all elements font (family, size, style and weight) from the drop down menu.

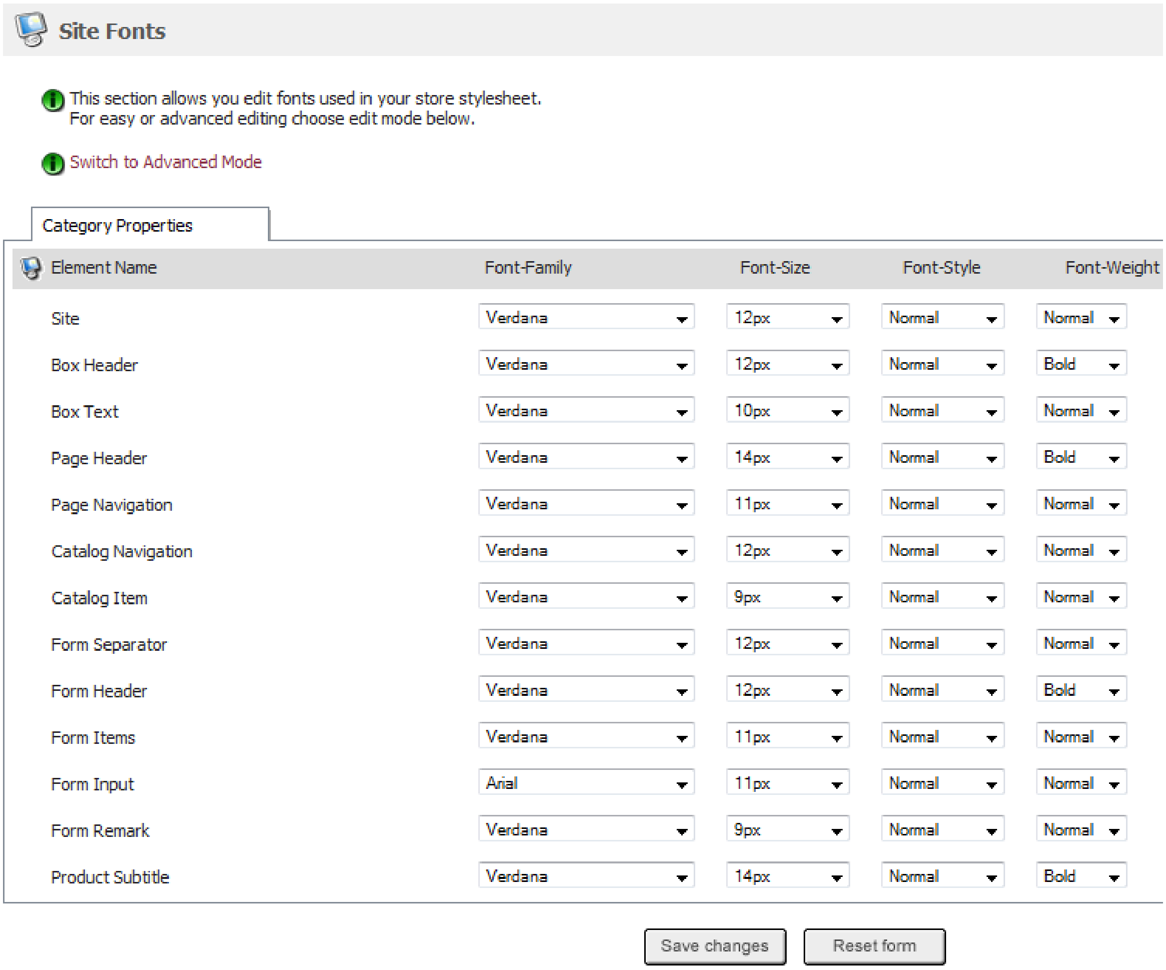


Figure 6-46-1: Site Fonts

4. If you want to reset the form, click on the **Reset form** button.
5. Click **Save changes** button to update your site fonts.

6.10 Edit Text Pages

This section is used for content management settings. You can add and manage (edit and delete) the site text pages of Springboard Promocart with the help of this section. To know in detail about the following sections, click on the respective links below:

Add a New Text Page 212
Edit 215
Delete 215

6.10.1 Add a New Text Page

You can use this section to add and manage the custom page of Springboard Promocart.

To **add a new custom text** page on Springboard Promocart, follow the steps:

1. Click **Edit Text Pages**, as shown in the Figure 6-47-1 below.

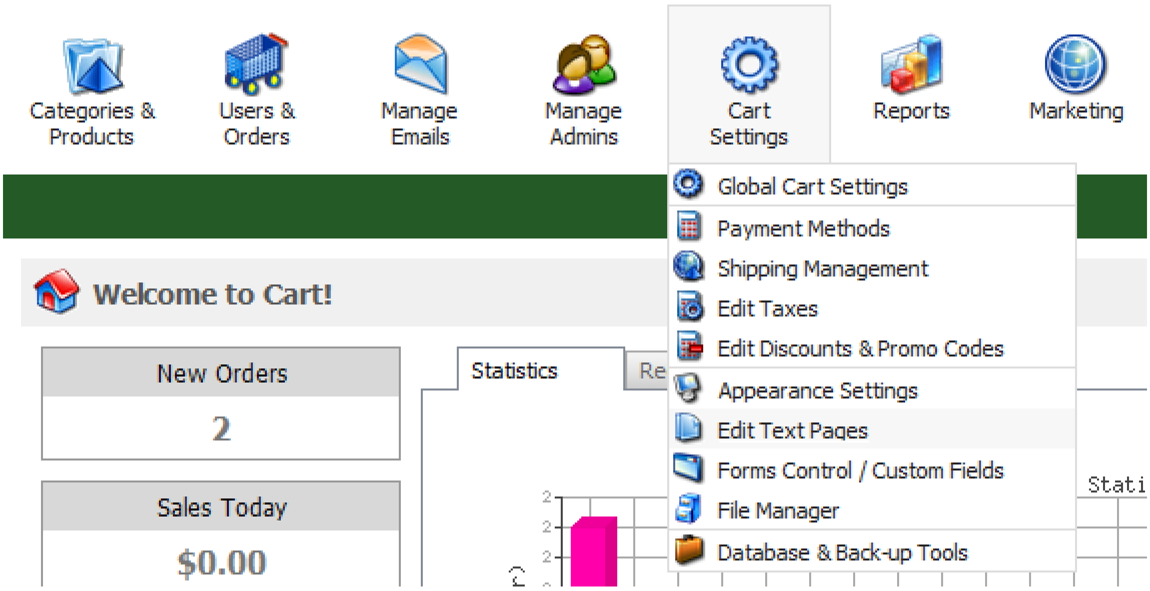


Figure 6-47-1: Edit Text Pages

2. The **Site Text Pages** will open, as shown in the Figure 6-47-2 below.

Note: You can also open the **Site Text Pages** directly by clicking on **Edit Text Pages** link in the Admin Area Home page 8.

It is recommended not to delete the four pre-defined text pages (**Terms and Conditions**, **About Us**, **Contact Information** and **How to Enable Cookies**).

You can also **edit** and **delete** the text pages from the **Site Text Pages.** To know more about editing 215 and deleting 215 a **text page**, click on each of the links.

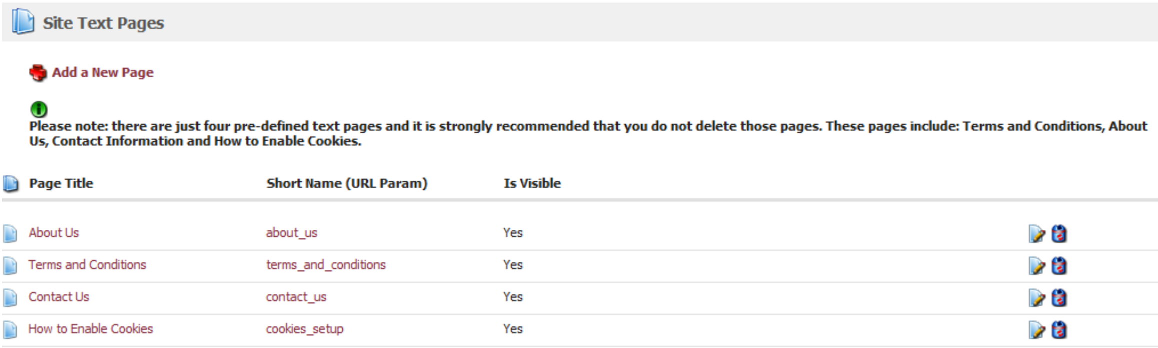


Figure 6-47-2: Site Text Pages

3. In the **Site Text Pages**, click on **Add a New Page** link.

The **Site Page (insert)** page will open.

Note: You can also change the Appearance Settings 191 of that site page by clicking **edit Appearance Settings (Default Images, Layout and Colors)** link on top of the **Site Page (insert)** page.

4. **Common Page Information:** Enter the following information:
   a. **Short Name:** Enter a name for the page.
   b. **Page Title:** Enter a page title for the menu.
   c. **Is This Page Visible:** Select **Yes** from the drop down menu if you want this page to be visible to the users. Selecting **No** will hide the page.
   d. **Priority:** Rank a page within your website using the priority feature. You can select this on a scale of 1 to 10, where 1 has the highest priority. The higher the number, the higher the page will be listed.

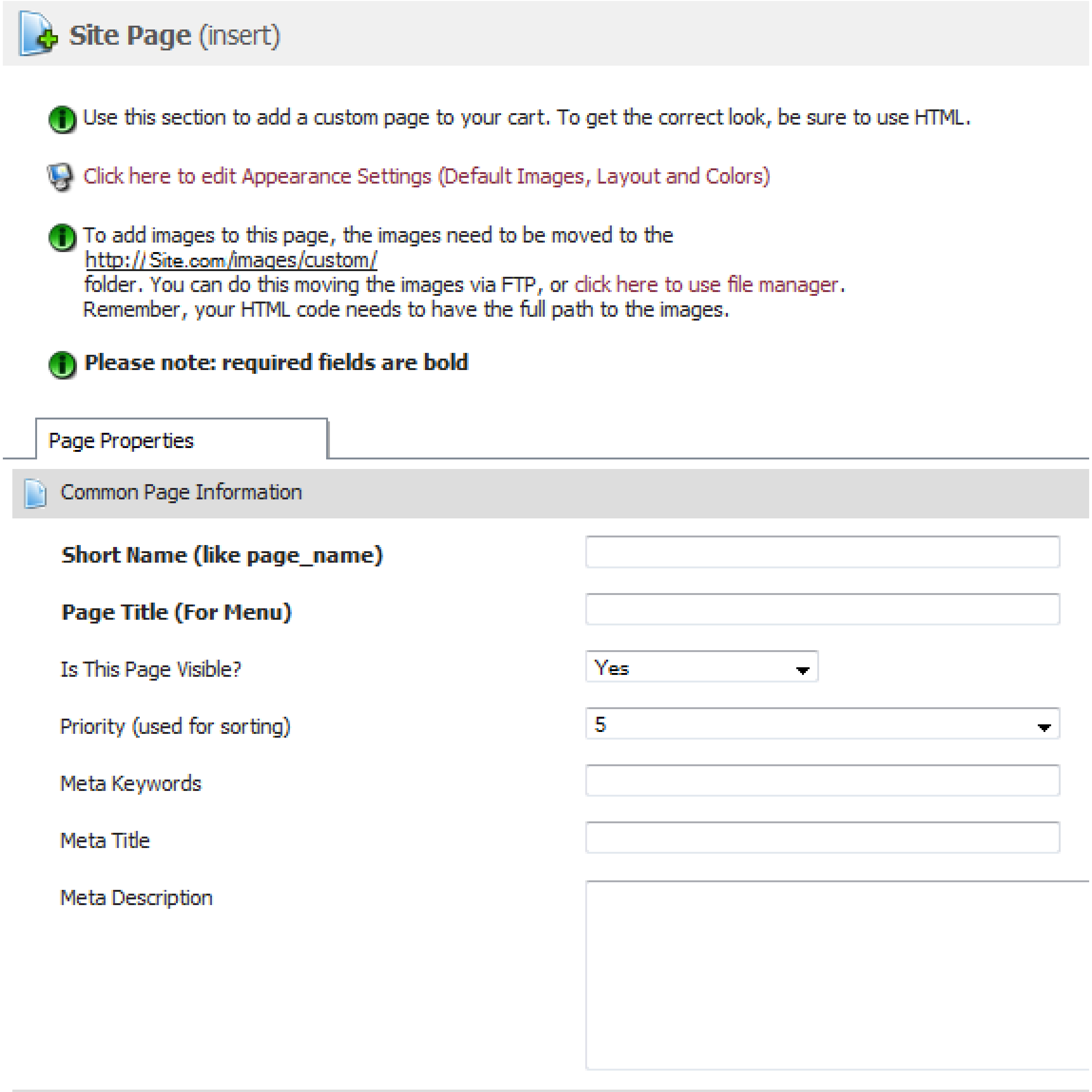


Figure 6-47-3: Common Page Information

5. **Link Locations:** Select **Yes** from the drop down menu for **Top** or **Bottom**, wherever you want the **link locations** and choose **No** for the other option, as shown in the Figure 6-47-4 below.

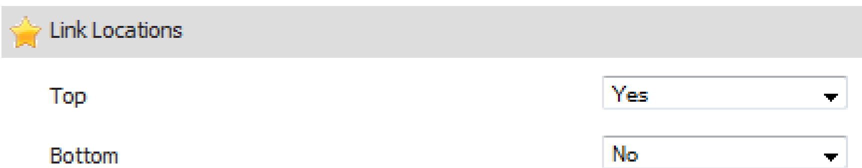


Figure 6-47-4: Common Page Information

6. **Page HTML:** Enter text in the **Page HTML box**.
7. You can also create an eye-catching description by clicking **Edit HTML Online** in **Page HTML**.

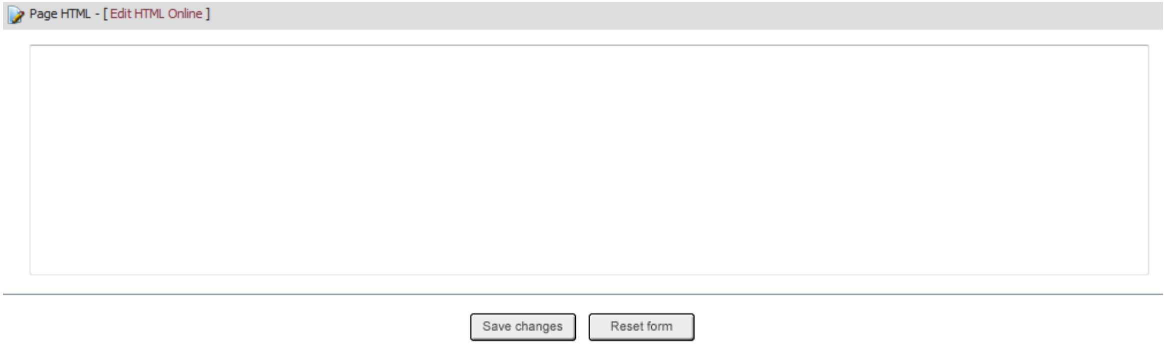


Figure 6-47-5: Page HTML

8. If you want to cancel or start again, click on **Reset form** button.
9. Click **Save changes** button to save details about the new text page. You will get a confirmation message that the **new page has been added successfully**.

6.10.2 Edit a Text Page

To **edit a text page**, follow the steps:

1. Open 212 the **Site Text Pages**.
2. Click **Edit Page** icon for a text page you want to modify.
3. The **Site Page (update)** opens, where you can modify all the parameters.
4. If you want to cancel or start again, click on the **Reset form** button.
5. Click **Save changes** button to update the information. You will get a confirmation message that the **new page has been updated successfully**.

6.10.3 Delete a Text Page

To **delete a text page**, follow the steps:

1. Open 212 the **Site Text Pages**.
2. Click **Delete Page** icon for a text page you want to remove.

A pop up appears asking for confirmation, as shown in the Figure 6-48-1 below.

Figure 6-48-1: Delete Confirmation

3. Confirm deletion process, by clicking **OK** button. You will get a confirmation

message that the page has been removed successfully.

6.11 Forms Control/ Custom Fields Overview

You can use this section to manage forms and custom fields. In addition, you can also control the standard fields like Company Name and Phone in Billing and Shipping information. You can also create a custom field as well as manage the existing fields. To know more about Forms Control/ Custom Fields section, click on the links below.

Add Custom Field 216
Edit 218
Delete 219

6.11.1 Add Custom Field

You can use this section to add a custom field. To **insert a new custom field**, follow the steps:

1. Click **Forms Control/ Custom Fields**, as shown in the Figure 6-49-1 below.

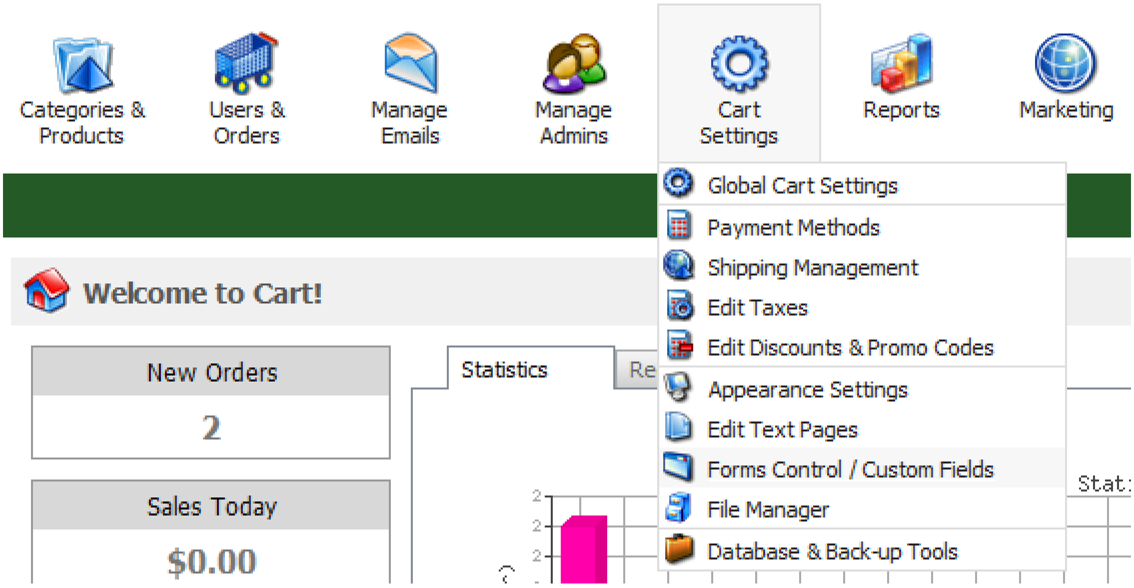


Figure 6-49-1: Forms Control/ Custom fields

2. **Add Forms Control/ Custom Fields** page will open, as shown in the Figure 6-49-2 below.

Note: You can control the **Standard Fields** by clicking on the radio button (**Required**, **Not Required** and **Not Available**) after each field. Once selected, click **Save changes** button to update.

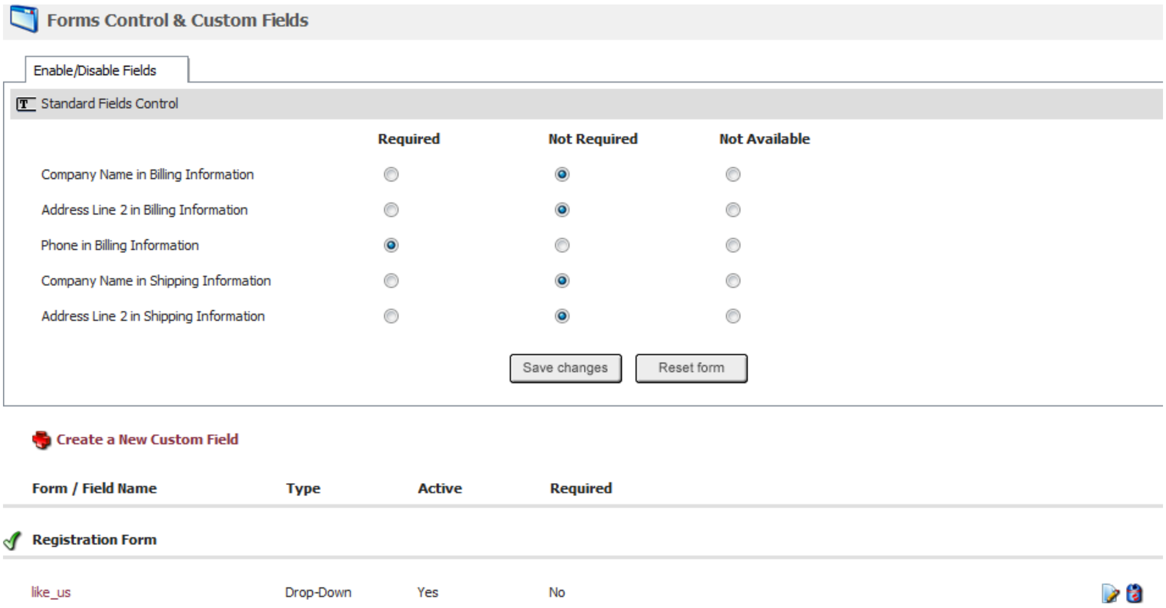


Figure 6-49-2: Add Forms Control/ Custom Fields page

3. Click on **Create a New Custom Field** link to open **Custom Field (Insert)** page, as shown in the Figure 6-49-3 below.

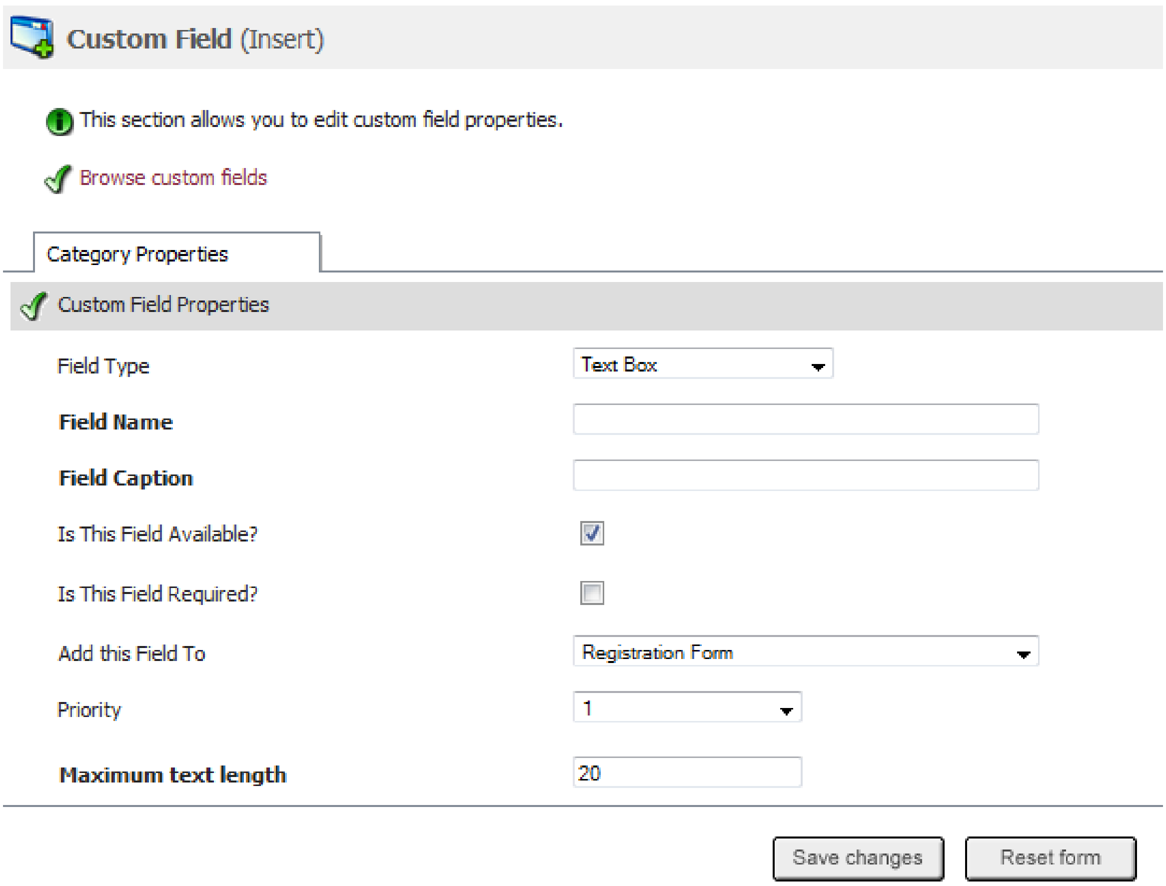


Figure 6-49-3: Custom Field (Insert)

4. Scroll down to **Custom Field Properties** and then enter the following information:
   a. **Field Type**: Use the drop-down menu to select the type of field (**Text Box**, **Drop-Down**, **Radio Buttons**, **Checkbox** and **Text Area**).
   b. **Field name**: Enter the name of the field
   c. **Field Caption**: Enter the caption of the field.
   d. **Is this field available**: Select this checkbox to make this an available field.
   e. **Is this field required**: Select this checkbox to make this a required field.
   f. **Add this field to**: Use the drop-down menu to select a section to which this field will be added.
   g. **Priority**: Assign a priority to this field from the drop-down menu. You can select this on a scale of 1 to 9, where 1 is given the highest priority.
   h. **Maximum text length**: Enter the maximum length of the text to be typed in the field.

Note: Maximum text length can only be entered for a **Text Box** field.

   i. **Options (one per line)**: Enter the options to be displayed in the drop-down/ radio button menu.

Note: **Options (one per line)** can only be entered for **Drop-Down** or **Radio Buttons** field.

   j. **Checked/ Unchecked value**: Enter the values as Yes/No to determine the behavior of the field when it is checked/ unchecked.

Note: Checked/ Unchecked value can only be entered for a **Checkbox** field.

5. If you want to cancel or start again, click on the **Reset form** button.
6. Click on **Save Changes** button to add a new field.

6.11.2 Edit Custom Field

You can use this option to edit a custom field.

To **edit a custom field**, follow the steps:

1. Open 216 the **Add Forms Control/ Custom Fields** page.
2. Click on **Edit Custom Field** icon to open **Custom Field (Update)** page, as shown in the Figure 6-50-1 below.
3. You can modify all the parameters for an existing field under **Custom Field Properties**.

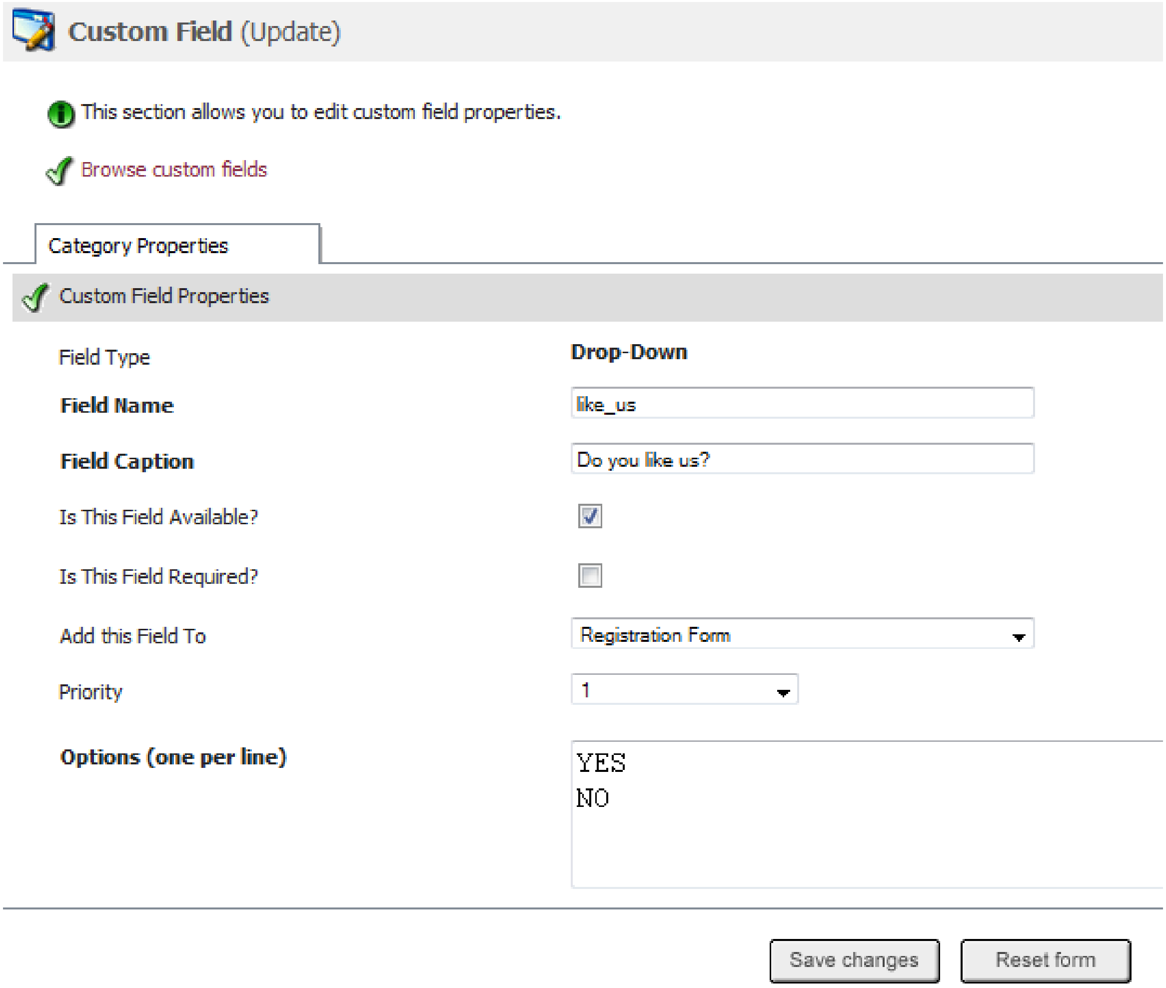


Figure 6-50-1: Custom Field (Update) page

4. If you want to reset the form, click on the **Reset form** button.
5. Click **Save changes** button to update the information.

6.11.3 Delete Custom Field

You can use this option to delete a custom field.

To delete **a custom field**, follow the steps:

1. Open 216 the **Add Forms Control/ Custom Fields** page.
2. Click on **Delete Custom Field** icon. A popup confirmation box will appear, as shown in Figure 6-51-1 below.

Figure 6-51-1: Delete Confirmation

3. Confirm deletion process, by clicking **OK** button.

6.12 File Manager

This section will allow you to manage your files on your website. You can edit and delete files using this section.

For **managing your files**, follow the steps:

1. Click **File Manager**, as shown in the Figure 6-52-1 below.

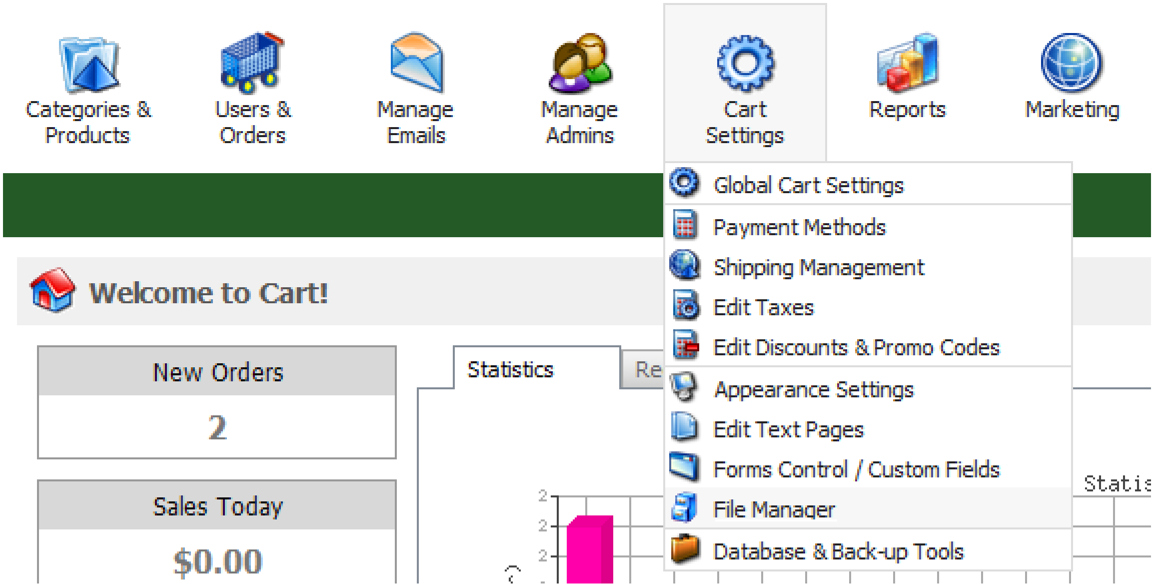


Figure 6-52-1: File Manager

Launch File Manager page will open, as shown in the Figure 6-52-2.

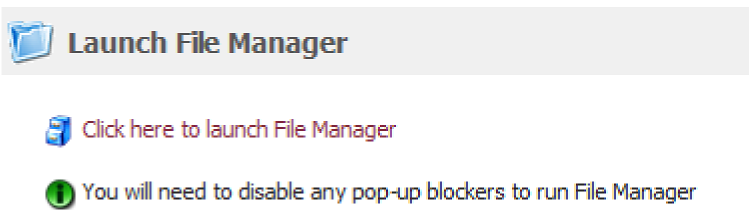


Figure 6-52-2: Launch File Manager

2. Click on **Click here to launch File Manger** link to open **Files Manager (browser)** window, as shown in the Figure 6-52-3 [221] below.

Note: You can also directly open the **Files Manager (Browser)** window, by clicking on **File Manager** link in the Admin Area Home page [8].

You will need to disable the pop-up blockers to run File Manager.

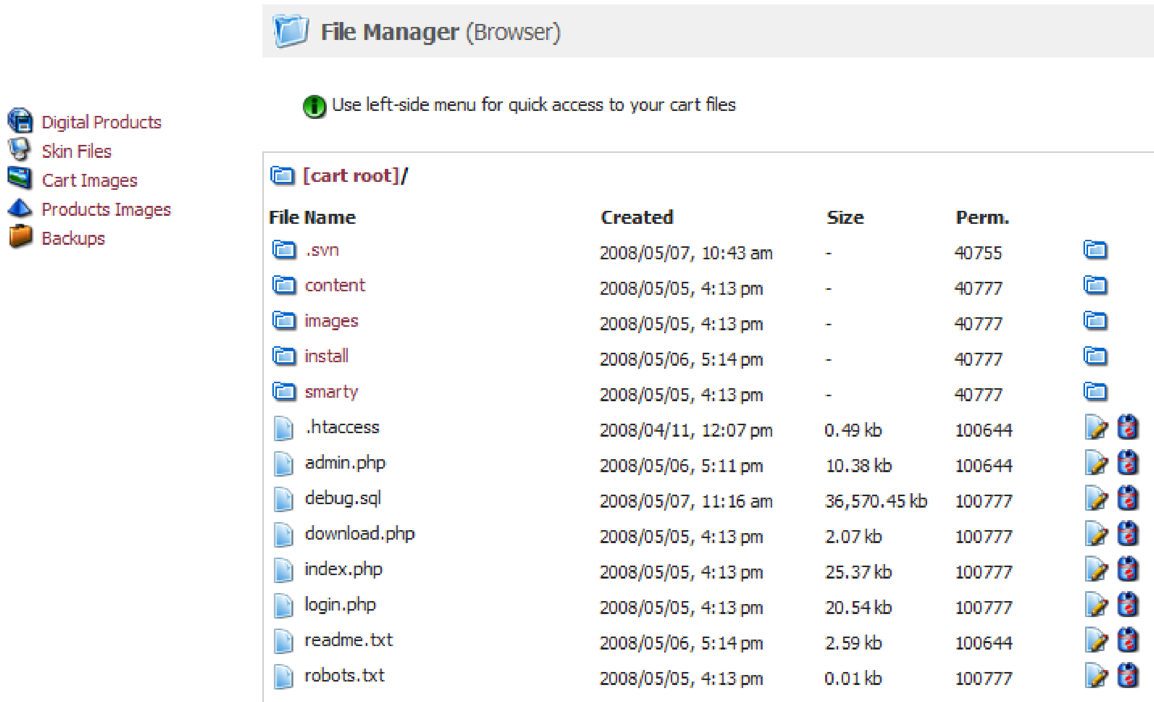


Figure 6-52-3: Files Manager (Browser) window

3. Click **Open Folder** icon under **Action** to open a folder.
4. Click **Edit File** icon to edit a file and **Delete File** icon to delete a file. After editing and deleting a file, click **Save changes** button.
5. Click **Browse** under **Upload New File Into This Folder** to upload a new file. The maximum file size must not exceed 2MB.

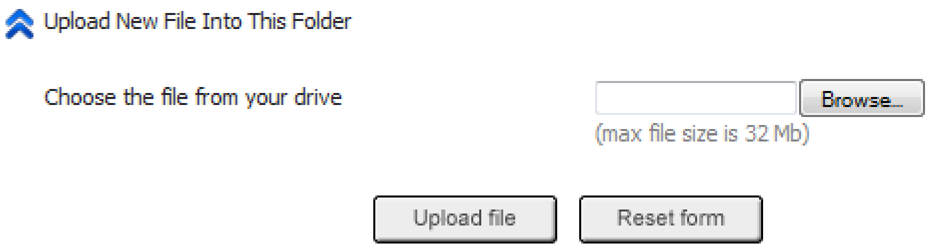


Figure 6-52-4: Upload New File

6. If you want to cancel or start again, click on the **Reset form** button.
7. Click **Upload file** button to upload a new file.

6.13 Database & Back-up Tools

You can use this section to perform important database management tasks. You can export the database records to your local computer, backup the database records and restore them, if required and can also clear existing database records. To know more about the Database and Backup-tools, click on the following links below.

Data Export 222
Backup/Restore 222
Clear Database 225

6.13.1 Backup/Restore Overview

You can use this section to perform backup of your database records, restore them and delete an existing backup. To know more about backup/restore, click on the links below.

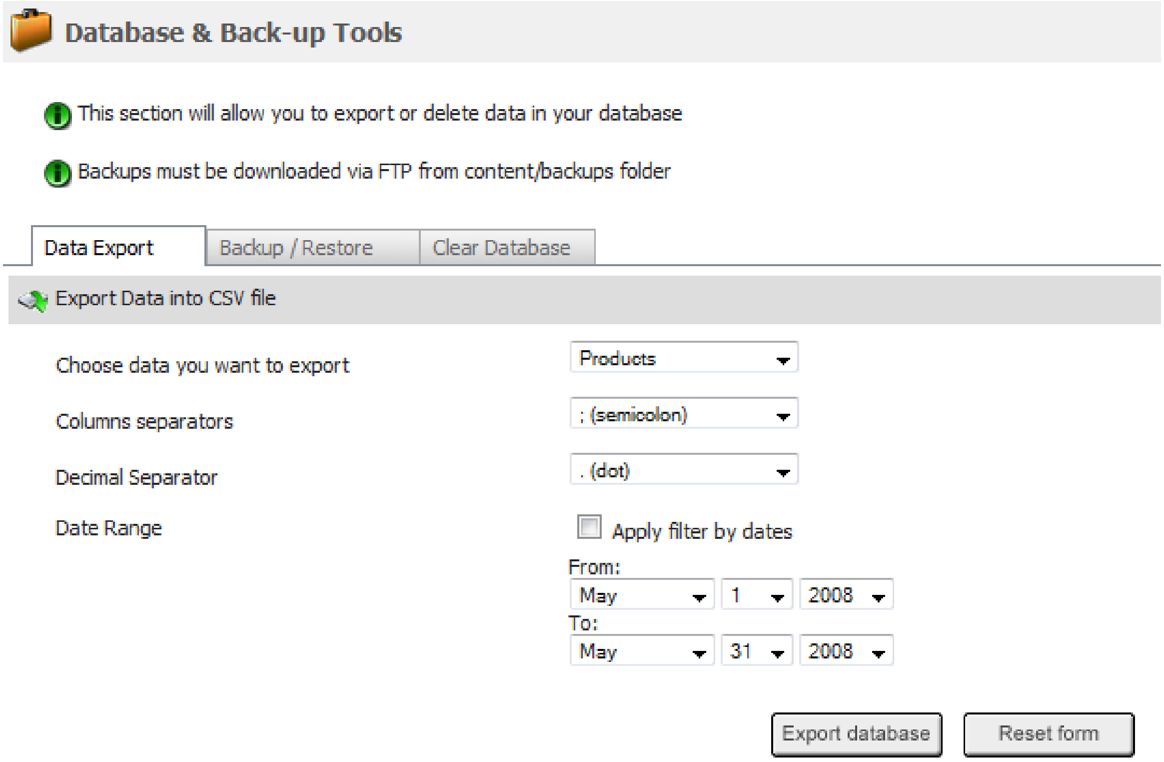
Create Backup 223
Restore 224
Delete 225

6.13.1.1 Data Export

You can use this section to export your products, orders or users..

To export any of the above, follow the steps:

1. Open the **Database & Back-up Tools** page.
2. Click on **Data Export** tab to open **Data Export** page, as shown in Figure 6-54-1.
3. Select the data you want to export from the pull down list.
4. Select if you want the columns separated with a **,** or a **;**
5. Select the Decimal Separator.
6. Now you can select to pull the data from the database within a certain date range or not.



7. Once done with that you can hit **Export database** and you will be prompted to save the csv file to your local computer.

6.13.1.2 Create Backup

You can use this section to create a backup of your existing database records.

To create a **backup**, follow the steps:

1. Open 222 the **Database & Back-up Tools** page.
2. Click on **Backup/ Restore** tab to open **Backup/ Restore** page, as shown in Figure 6-54-1.
3. Select the categories you want backup from **Backup Springboard Promocart** list.

Note: You can also select all categories by clicking the **check all** link under **Backup Springboard Promocart**.

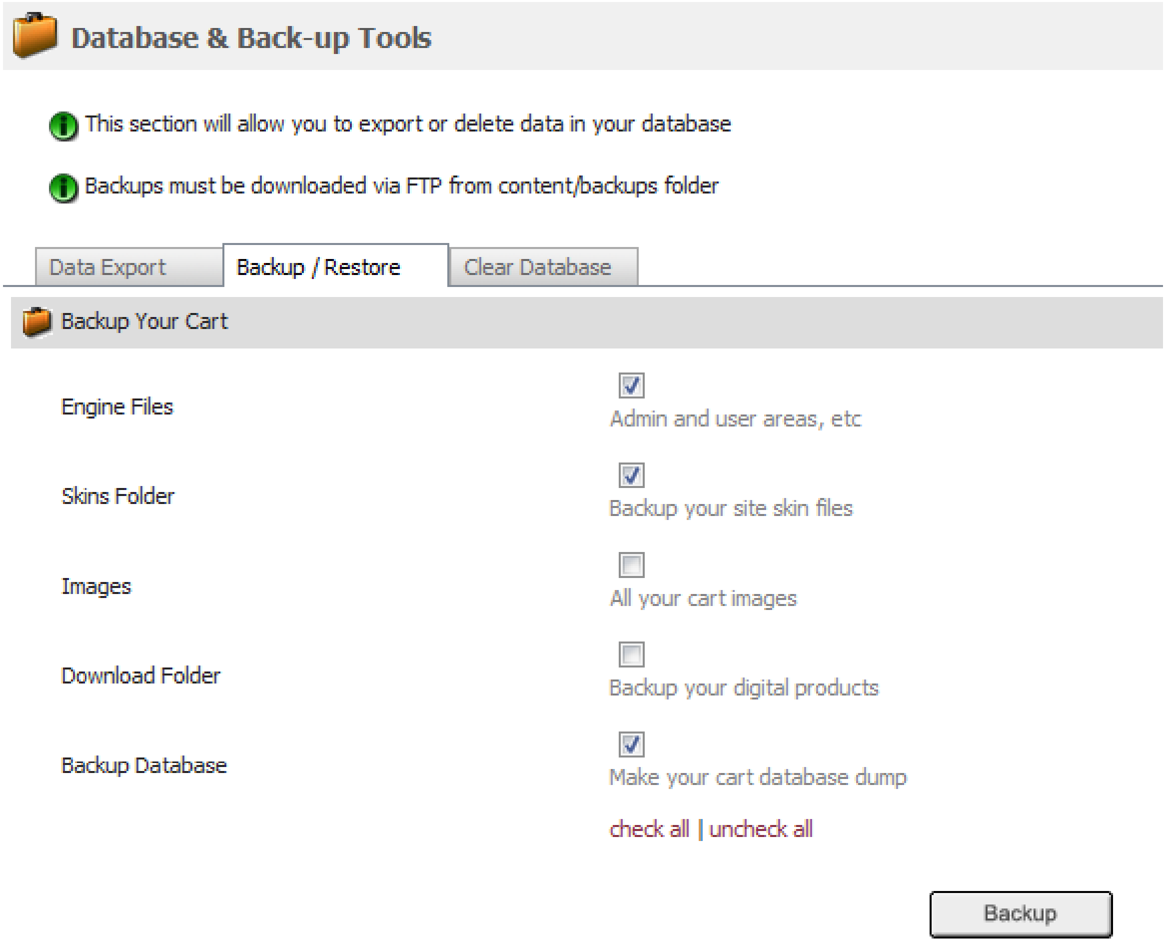


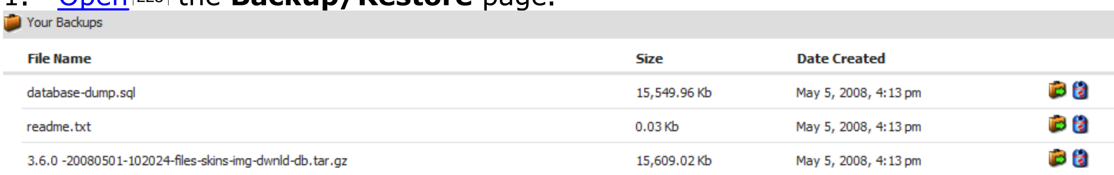
Figure 6-54-1: Backup/Restore page

4. Click on the **Backup** button to create a backup. The created backup can be seen under **Your Backups**.

6.13.1.3 Restore Backup

To restore backup:

1. Open 223 the **Backup/Restore** page.



2. Click on **Restore** icon under **Your Backups** to perform restoration using an existing backup. A popup box will appear requesting your confirmation.

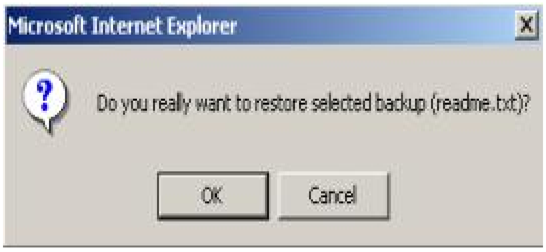


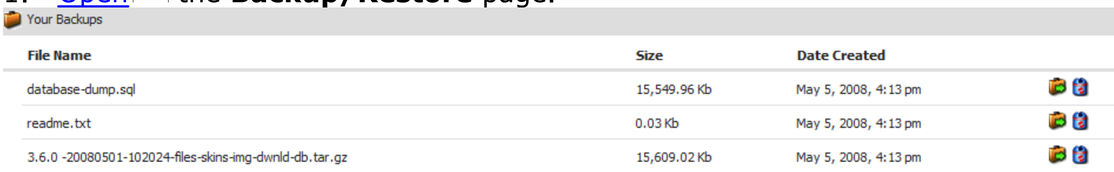
Figure 6-55-1 – Restore backup page

3. Click **OK** button to confirm restoration.

6.13.1.4 Delete Backup

You can use this section to delete an existing backup.

1. Open 223 the **Backup/Restore** page.


Your Backups

File Name	Size	Date Created
database-dump.sql	15,549.96 Kb	May 5, 2008, 4:13 pm
readme.txt	0.03 Kb	May 5, 2008, 4:13 pm
3.6.0 -20080501-102024-files-skins-img-dwnld-db.tar.gz	15,609.02 Kb	May 5, 2008, 4:13 pm

2. Click on **Delete** icon to remove an existing backup from **Your Backup** list. A popup box will appear requesting your confirmation.

Figure 6-56-1: Delete Backup/Restore Page

3. Click **OK** button to confirm deletion.

6.13.1.5 Clear Database

You can use this section to delete your existing database records.

To clear the database, follow the steps:

1. Open the **Database & Back-up Tools** page.
2. Click on **Clear Database** tab to open **Clear Database** page, as shown in the Figure 6-57-1.
3. Select the sections that you want to remove under **Clear Database**.

Note: You can also select all sections by clicking the **check all** link.

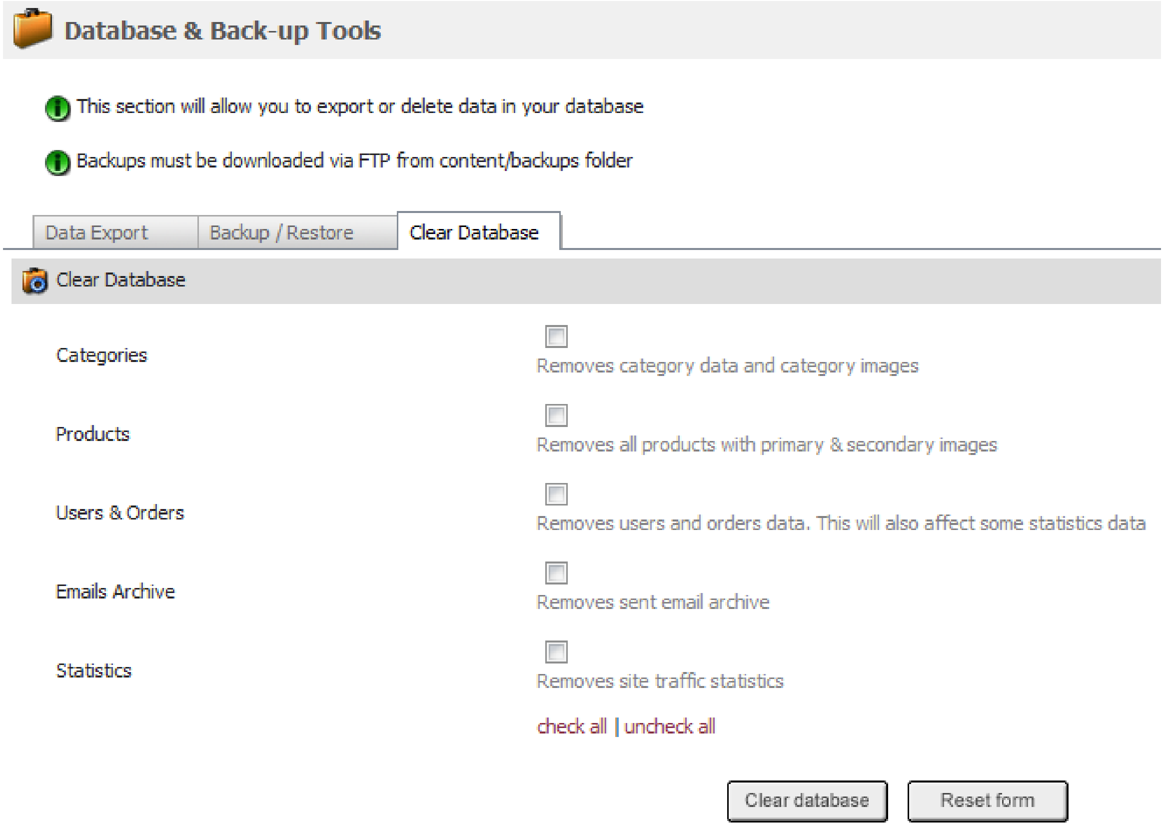


Figure 6-57-1: Clear Database

4. If you want to cancel or start again, click on the **Reset form** button.
5. Click **Clear database** button to delete the data.

Top Level Intro

This page is printed before a new top-level chapter starts

Part VII

7 Charts and Reports

This section will give your statistics details. To know specifically about the following sections, click on respective links below:

Charts 228
Reports 230

7.1 Charts

In this section you can view monthly graphical representation of total pages viewed, unique hosts and sales in US Dollars.

To view this data, follow the steps:

1. Click **Charts**, as shown in the Figure 7-1-1 below.

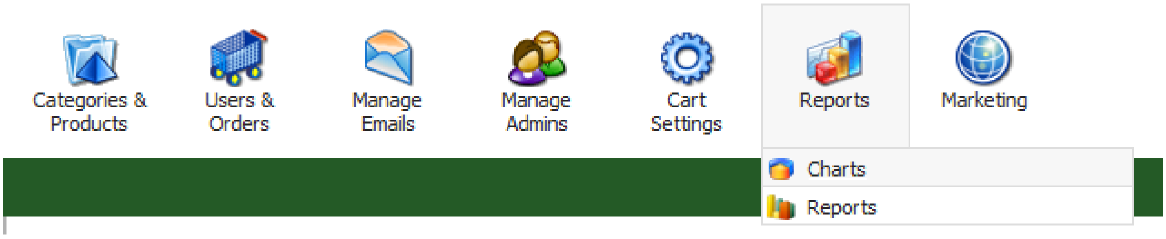


Figure 7-1-1: Charts

2. The **Charts** page will open, as shown in the Figure 7-1-2 229 below.

Note: You can also open the **Charts** page directly by clicking on **Charts** link in the Admin Area Home page 8.

3. In the **Charts** page, under **Select Period & Charts Type**, select a **month**, **year** and **chart type** (**Bars**, **Lines**, **Dots**, etc.) from the drop-down menu.

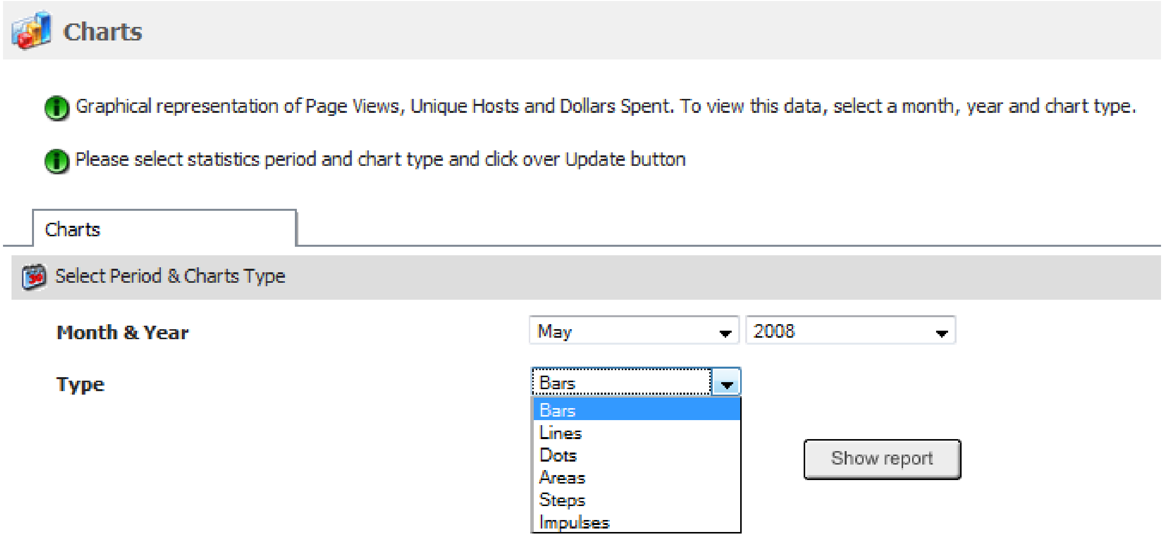


Figure 7-1-2: Charts Page

4. Click **Show report** button.
5. The graphical representation of the selected month & year will open, as shown in the Figure 7-1-3 below.

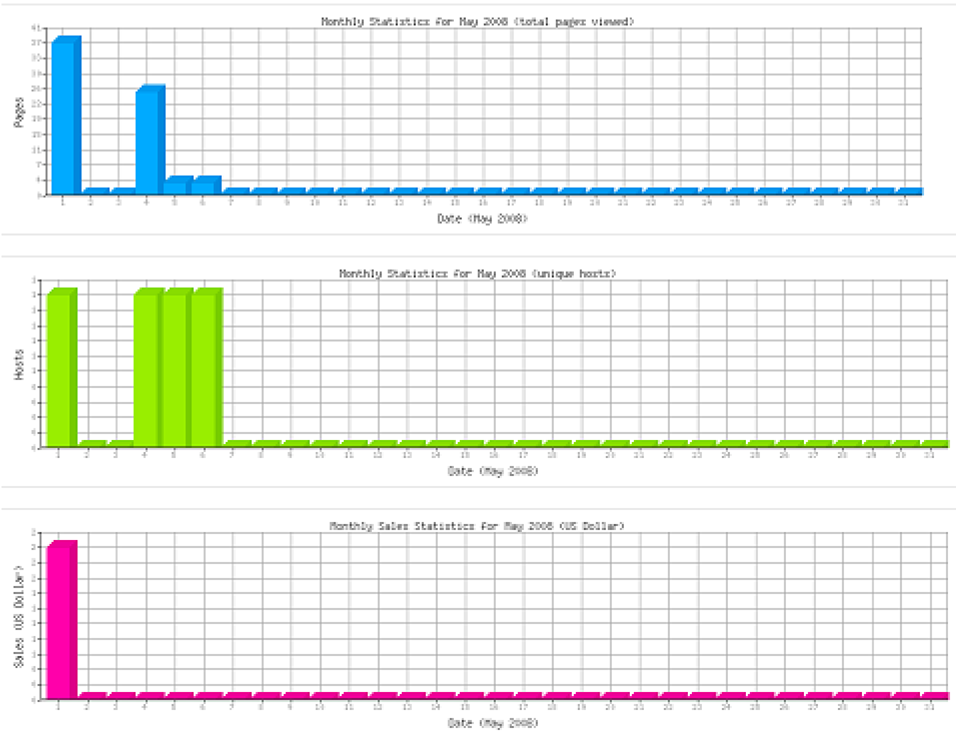


Figure 7-1-3: Graphical Representation

7.2 Reports

In this section you can view different types of reports. To view this reports, follow the following steps:

1. Click **Reports**, as shown in the Figure 7-2-1 below.

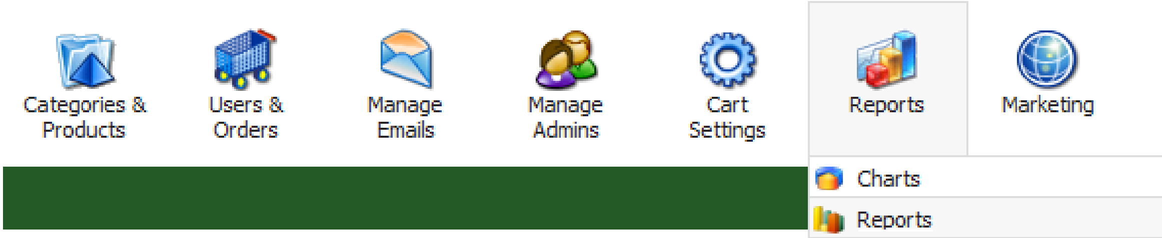


Figure 7-2-1: Reports

2. **Reports** page will open, as shown in the Figure 7-2-2 [230] below.

Note: You can also open the **Reports** page directly by clicking on the **Reports** link in the Admin Area Home page [8].

3. In **Reports** page, under **Select Report Date Range**, select a **date range** from the drop-down menu.
4. Choose a **report type** by clicking on the radio-button.

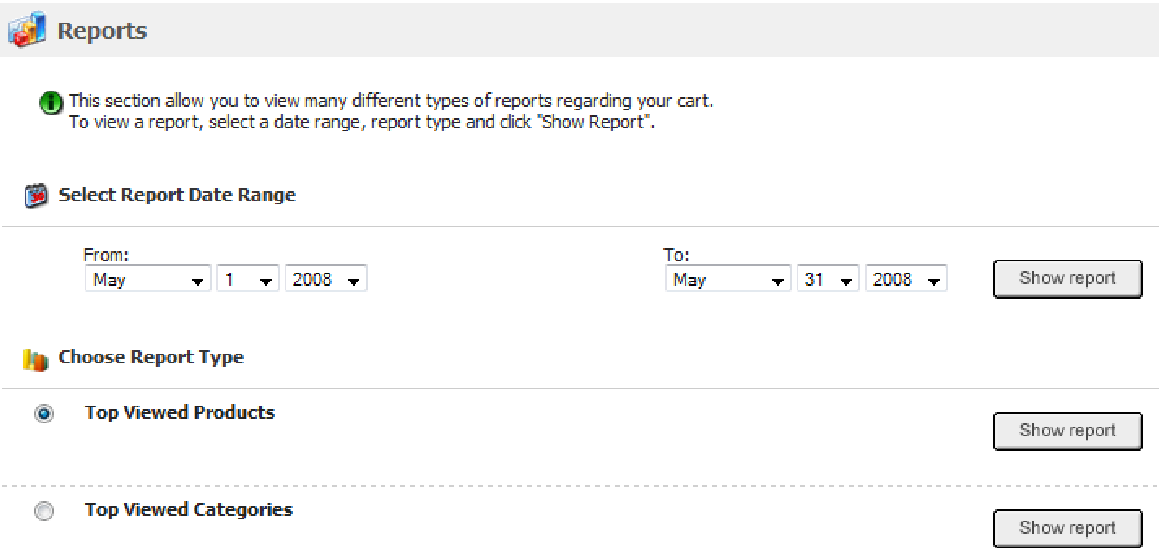


Figure 7-2-2: Select Reports Page

5. Click **Show report** button.
6. The selected report within that range you have selected will open, as shown in the Figure 7-2-3 below.

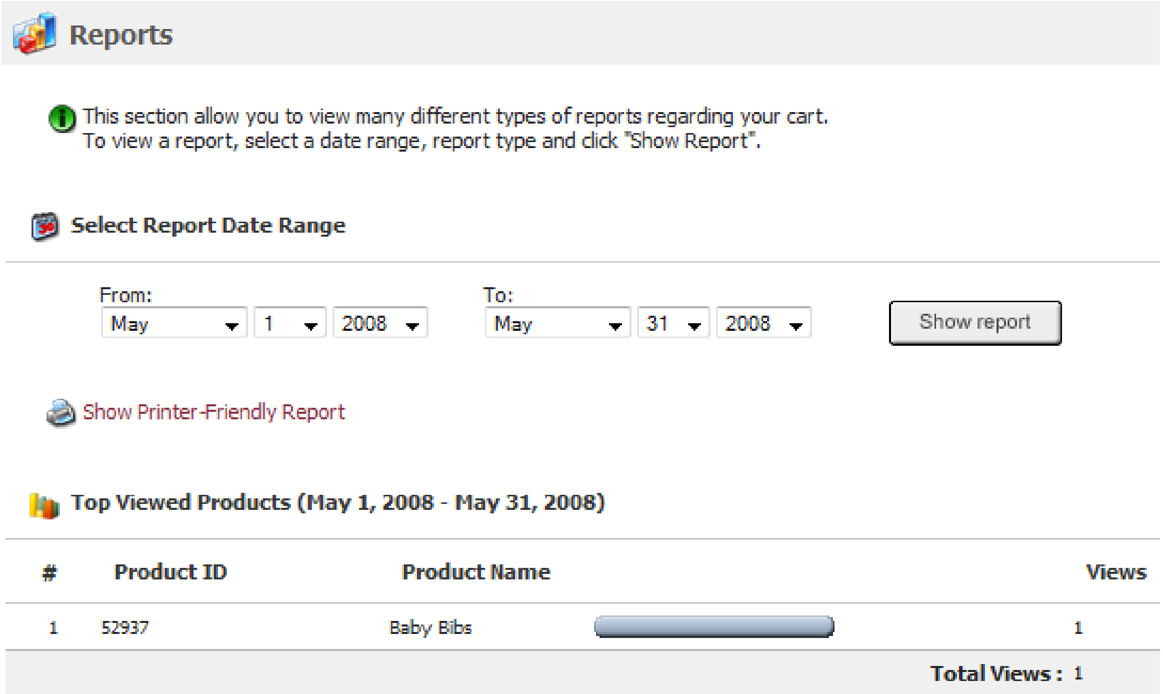


Figure 7-2-3: Selected Report Type Information

Note: You can also view **printer friendly report**, by clicking Show Printer-Friendly Report in **Reports** page.

Top Level Intro

This page is printed before a new
top-level chapter starts

Part VIII

8 Marketing

You can use this section for marketing. To know more about marketing with the help of this section, click on the links below.

8.1 Sale Prices

You can use this section to globally set or remove sale prices within the cart.

To **set sale prices** within the cart, follow the steps:

1. Click **Sale Prices**, as shown in the Figure 8-3-1 below.

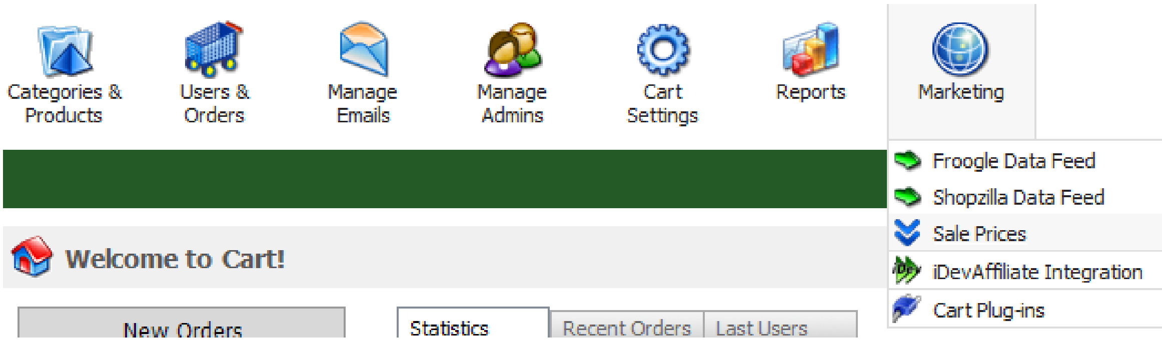


Figure 8-3-1: Sale Prices

Setup Sale Prices page will open, as shown in the Figure 8-3-2 234.

Note: You can also open the **Setup Sale Prices** page directly by clicking on **Sale Prices** link in the Admin Area Home page 8.

2. Under **Price Update Settings**, click on the radio button of the **Set New Sale Prices** and enter the discount price. You can also select from the drop down menu that the discount is in **%** or **$**.

Note: You can also delete all sale prices by clicking on the radio button of the **Remove All Sale Prices** and then clicking **Save Changes** button to remove all the

sale prices. A confirmation pop up appears, click **OK** button.

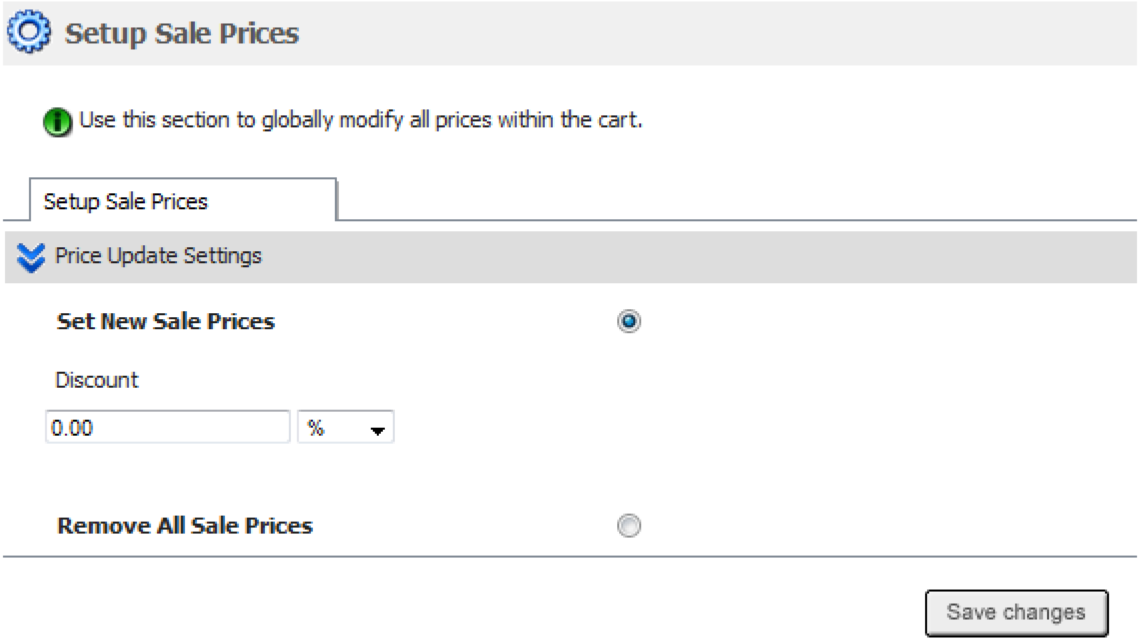


Figure 8-3-2: Setup Sale Prices

3. Click **Save changes** button to save the details. You will get a confirmation message that the Sale Prices has been updated successfully.

8.2 iDev Affiliate Integration

This section will allow you to integrate or put together the iDevAffiliate application.

To **integrate the iDevAffiliate application**, follow the steps:

1. Click **iDevAffiliate Integration**, as shown in the Figure 8-4-1 below.

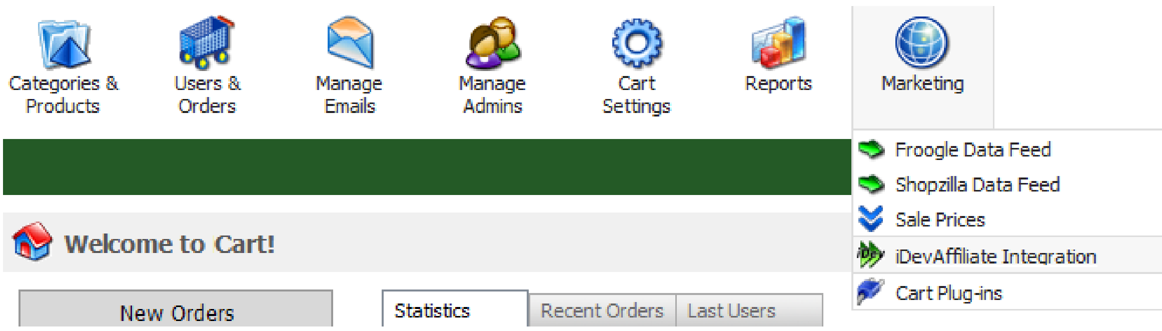


Figure 8-4-1: Affiliate App Integration

iDev Affiliate Integration page will open, as shown in the Figure 8-4-2 235.

Note: You can also open the **iDev Affiliate Integration** page directly by clicking on **Affiliate Integration** link under **Cart Settings** or **iDev Affiliate Integration** link under **Marketing** in the Admin Area Home page 8.

2. **Affiliate App Integration Settings:** Enter the following information, as shown in the Figure 8-4-2 235 below:
    a. **Do You Want to Enable iDevAffiliate:** Select **Yes** from the drop down menu if you want to enable iDevAffiliate, otherwise select **No**.
    b. **iDevAffiliate Installation URL:** Enter the iDevAffiliate Installation URL.
    c. **iDev Affiliate Username:** Enter the iDevAffiliate username.
    d. **iDev Affiliate Password:** Enter the iDevAffiliate password.
    e. **Affiliate Link Text:** Enter the Affiliate Link Text.

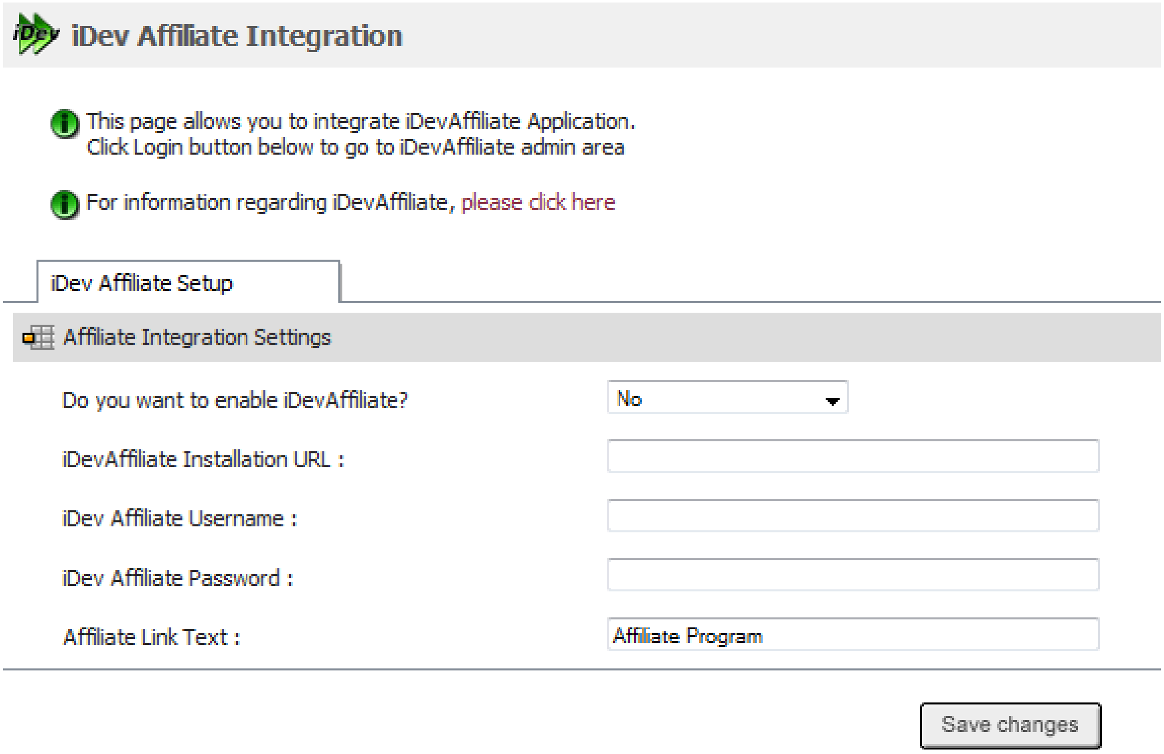


Figure 8-4-2: Affiliate App Integration Settings

3. Click **Save changes** button to save details about the **iDevAffiliate Integration Settings**.

8.3 Cart Plug-ins

This area allows you to manage Cart Plug-ins like Product Feeds, Miscellaneous Plugins, and Data Export. This allows you to simplify the integration process by providing a quick and fast way to import and export product related data. To manage

Cart Plug-ins area, follow the steps below.

1. Click **Cart Plug-ins**, as shown in the Figure 8-5-1 below.

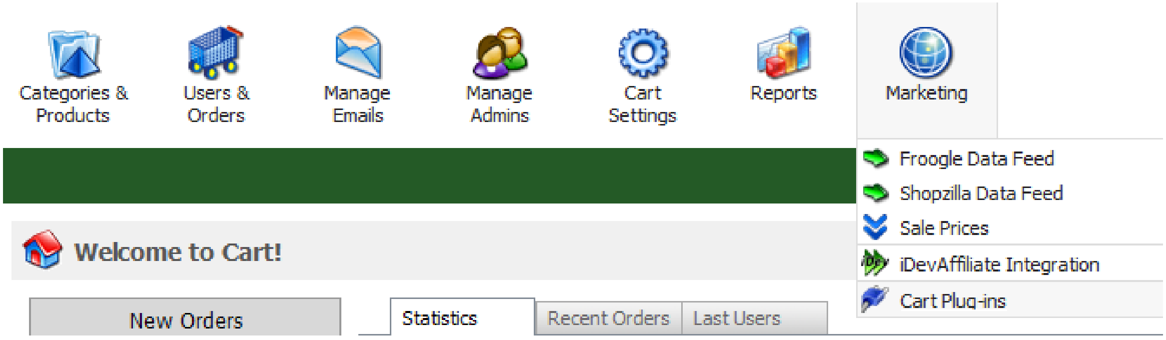


Figure 8-5-1: Cart Plug-ins

2. **Cart Plug-ins Settings** page will open, as shown in the Figure 8-5-2 below, displaying the list of plug-ins available to you.

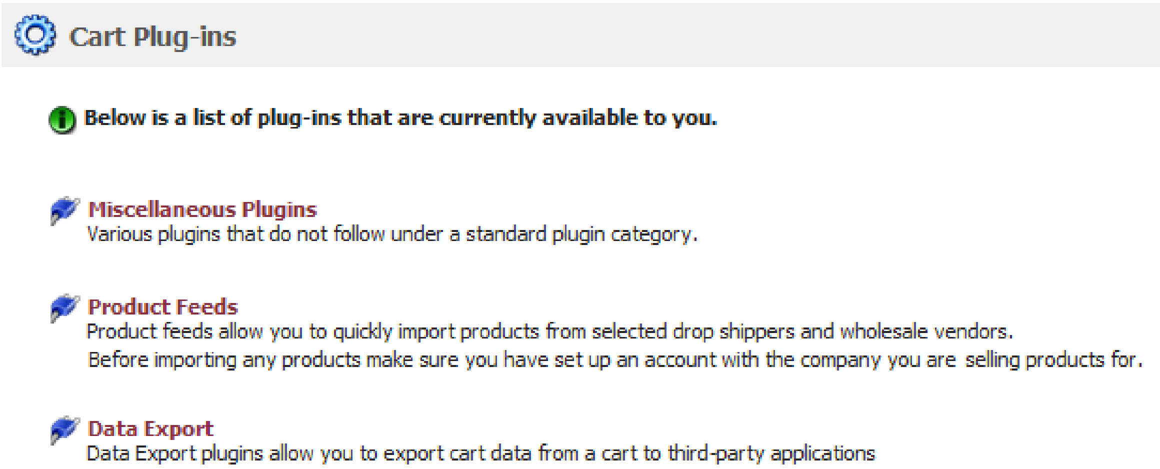


Figure 8-5-2: Cart Plugins Settings

3. Click **Product Feeds** link , **Miscellaneous Plugins** link, or **Data Export** link to open respective plug-ins in **Cart Plug-ins Settings** page. To know more about **Product Feeds** or **Data Export**, click on the links below.

Product Feeds 241
Data Export 236

8.3.1 Data Export

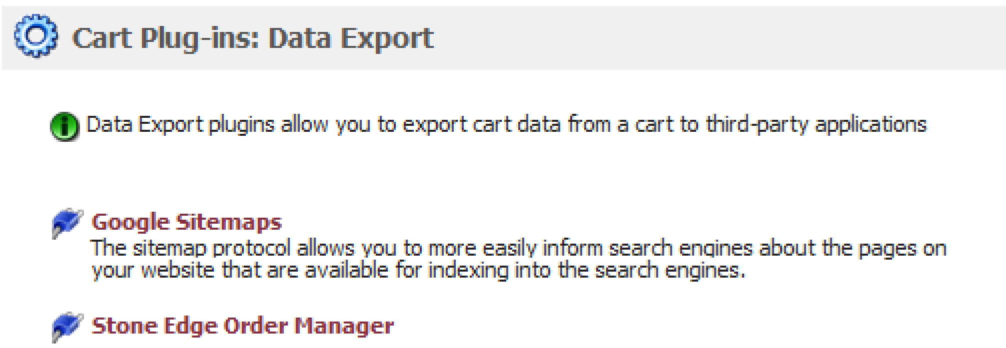
Data Export cart plug-in allows you to export marketing related data like google sitemaps to your local computer or to an order management website like stoneedge.com.

To open **Data Export** page, follow the steps below.

1. Open the **Cart Plug-ins** Settings page.

2. Click on **Data Export** link to open **Cart Plug-ins: Data Export** page, as shown in the Figure below. The page displays a list of various Data Export options available.

3. Click Google Sitemaps link or Stone Edge Order Manager link to open respective options.



Note: Google Sitemaps and Stone Edge Order Manager are used as an example in this section. Data export options may vary from user to user.

8.3.1.1 Stone Edge Order Manager

The Stone Edge Order Manager is the leading order management system for small-to-medium Web merchants. The Order Manager makes it easy to import orders from your Springboard Promocart and then gives you the tools you need to manage your business efficiently.

To use Stone Edge Order Manager, follow the steps below.

1. Open the **Cart Plug-ins: Data Export** page.
2. Click on **Stone Edge Order Manager** link to open **Stone Edge Order Manager Settings** page, as shown in the Figure 8-7-4.

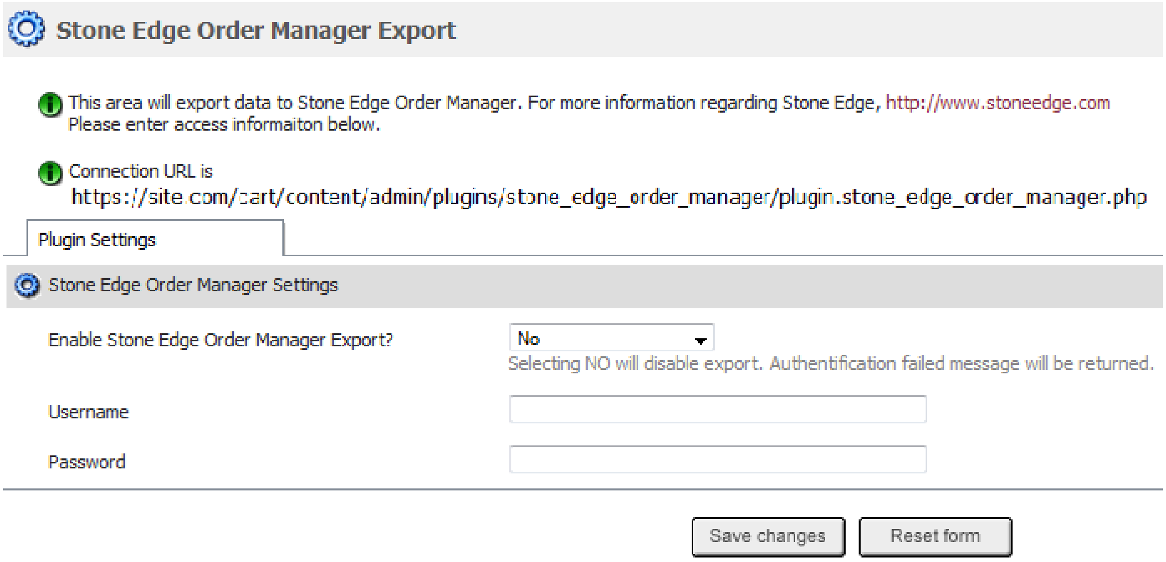


Figure 8-7-4: Stone Edge Order Manager Settings

3. Set **Enable Stone Edge Order Manager Export** drop-down box to **Yes** to enable export. Selecting **No** will disable export and Authentication failed message will be returned.
4. Enter your **Username** and **Password**.
5. If you want to reset the form, click on the **Reset form** button.
6. Click **Save changes** button to update the information.

8.3.1.2 Google Base Data Feed

Google Base is a new service from **Google** that find information about products for sale online. By concentrating completely on product search, Google Base applies the power of Google's search technology to a very particular task: locating stores that sell the item you want to find and pointing you directly to the place where you can make a purchase.

To use **Google Base Data Feed** for your product, follow the steps below.

1. Click **Google Base Data Feed**, as shown in the Figure 8-1-1 below.

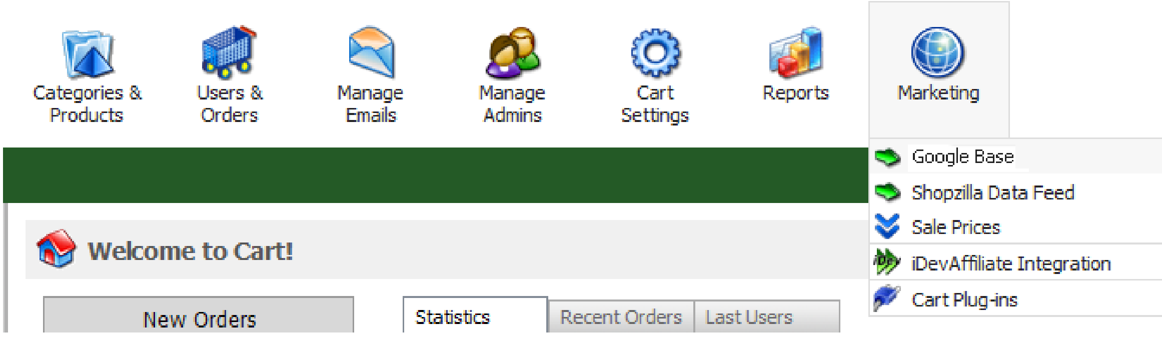


Figure 8-1-1: Google Base Data Feed

2. **Google Base Data Feed Export** page will open, as shown in the Figure 8-1-2 below.

Note: You can also open the **Google Base Data Feed Export** page directly by clicking on **Google Base Data Feed** link in the Admin Area Home page 8.

3. **Product Description:** Select **Use quick overview** or **Use detailed description** from the drop down menu.

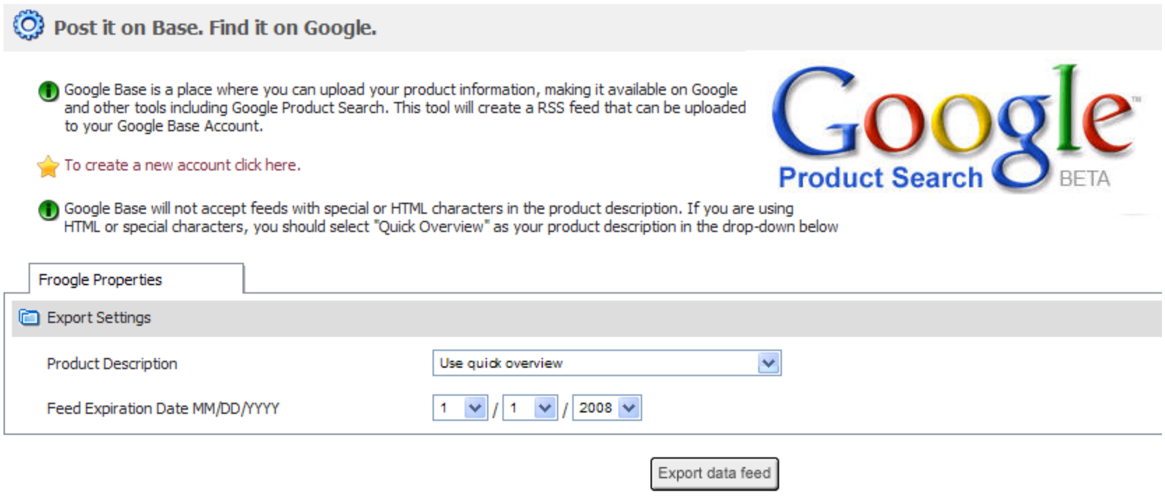


Figure 8-1-2: Google Base Data Feed Export

4. Click **Export data feed** button. You will be taken to the **Springboard Promocart login** page.

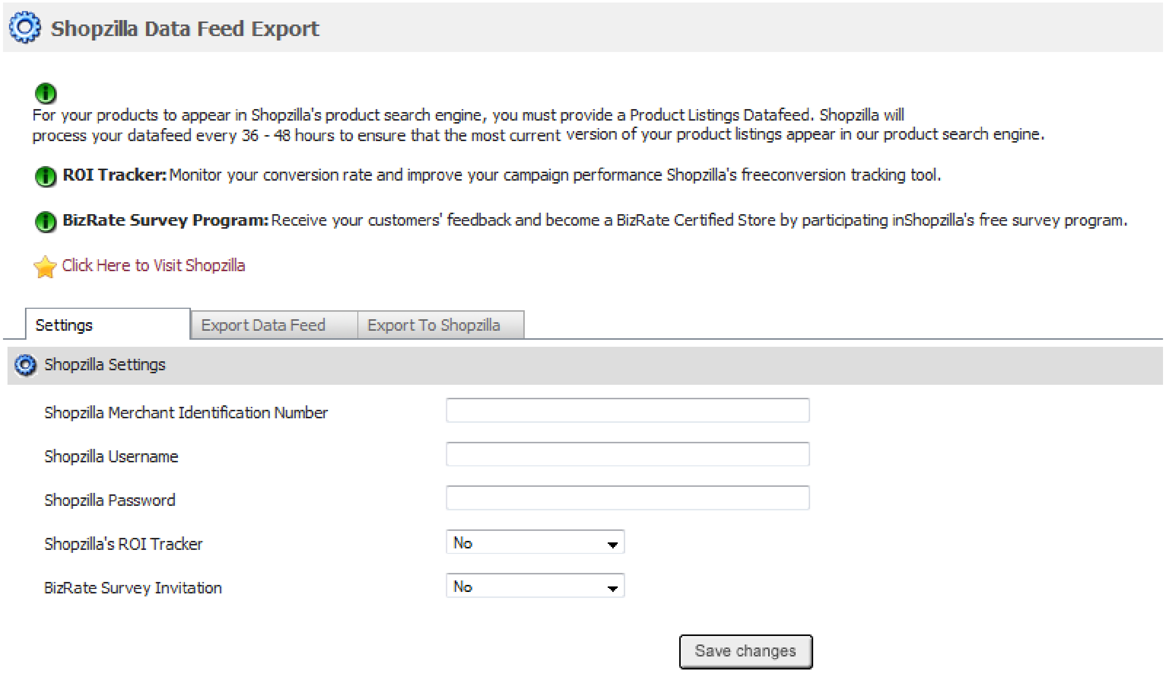
8.3.1.3 Shopzilla Data Feed Export

For your products to appear in Shopzilla's product search engine, you must provide a Product Listings Datafeed. Shopzilla will process your datafeed every 36 - 48 hours to ensure that the most current version of your product listings appear in our product search engine. You can sign up for a shopzilla merchant account by going to http://merchant.shopzilla.com/ .

1. Once signed up you will need to fill in your **<u>Shopzilla Merchant Identification Number</u>**, your **<u>Shopzilla Username</u>**, and your **<u>Shopzilla Password</u>**.

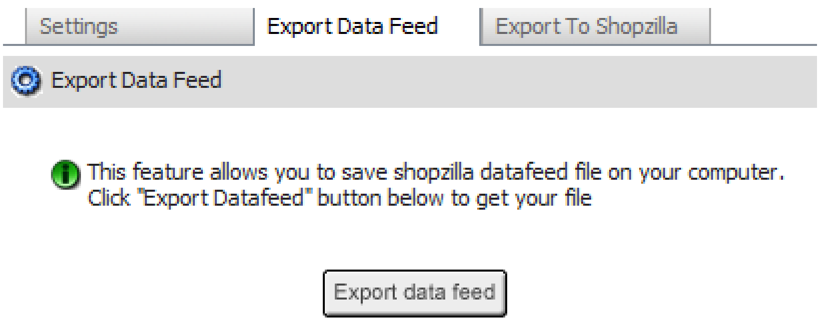
- **ROI Tracker:** Monitor your conversion rate and improve your campaign performance Shopzilla's free conversion tracking tool.
- **BizRate Survey Program:** Receive your customers' feedback and become a BizRate Certified Store by participating in Shopzilla's free survey program.

2. Click on **Save Changes** once you have the information filled in.



This feature allows you to save shopzilla datafeed file on your computer.

Click "Export Datafeed" button below to get your file.



This feature allows you to export your products directly to a shopzilla.

Click "Export To Shopzilla" button to do it now.

8.4 Products Feeds

Product Feeds cart plug-in allows you to quickly import products from selected drop shippers and wholesale vendors. Before importing any products, make sure you have set up an account with the company you are selling products for.

To **Manage Product Feeds** area, follow the steps below.

1. Open 235 the **Cart Plug-ins Settings** page.
2. Click on **Product Feeds** link to open **Cart Plug-ins: Product Feeds** page, as shown in the Figure 8-6-1 below. This page displays a list of selected drop shippers and wholesale vendors from which you can import products.

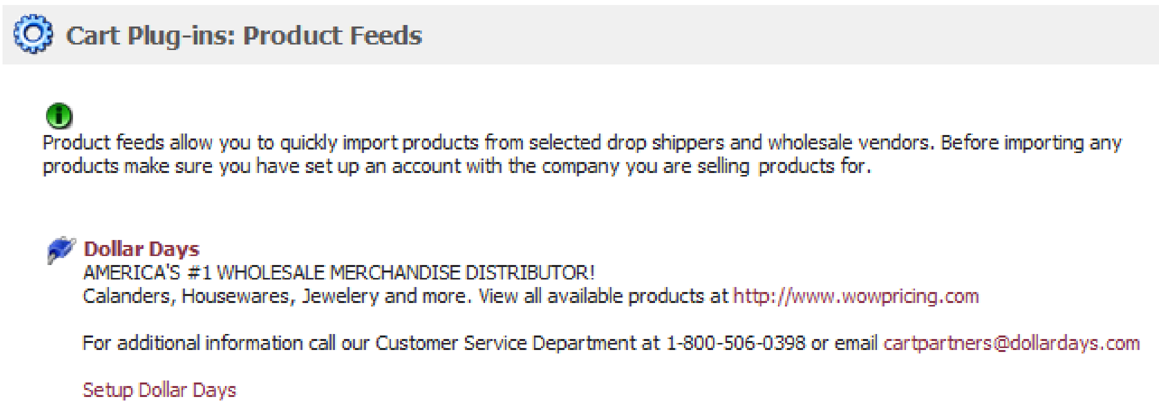


Figure 8-6-1: Cart Plug-ins: Product Feeds

3. Click on **Dollar Days** link to open **DollarDays.com Import** page, as shown in the Figure 8-6-2 below.

Important: Springboard Promocart will allow you to order products directly from the admin area of Springboard Promocart once you sell Dollar Days items. For this feature to work, you will need to open an account through Dollar Days and enter in your account information in the "Setup Dollar Days" area.

Note: You can also click on **Setup Dollar Days** link to manage the Dollar Days Settings. You need a Dollar Days username and password to continue.

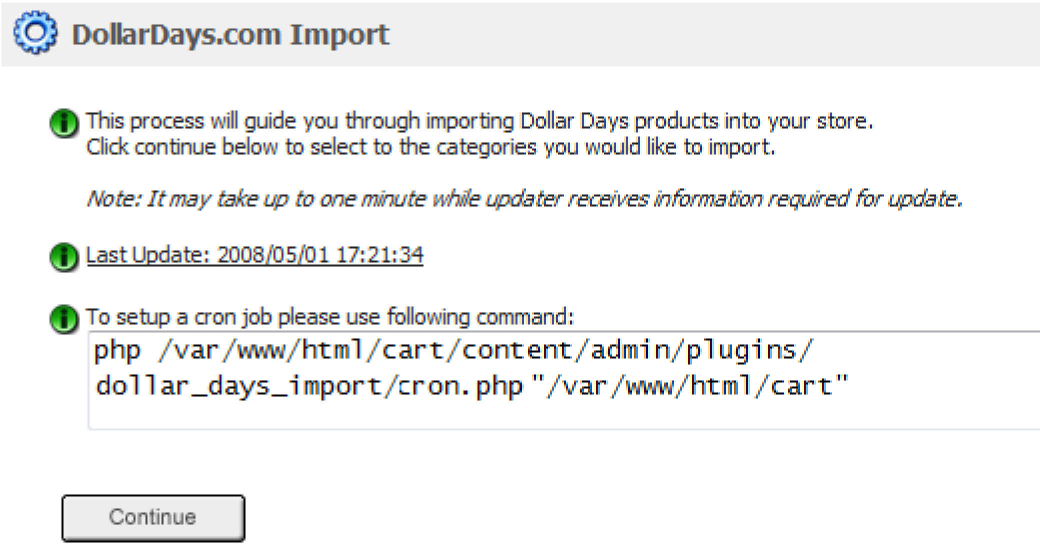


Figure 8-6-2: DollarDays.com Import

4. Click **Continue** button to open **DollarDays.com Import Settings** page, as shown in the Figure 8-6-3 below.

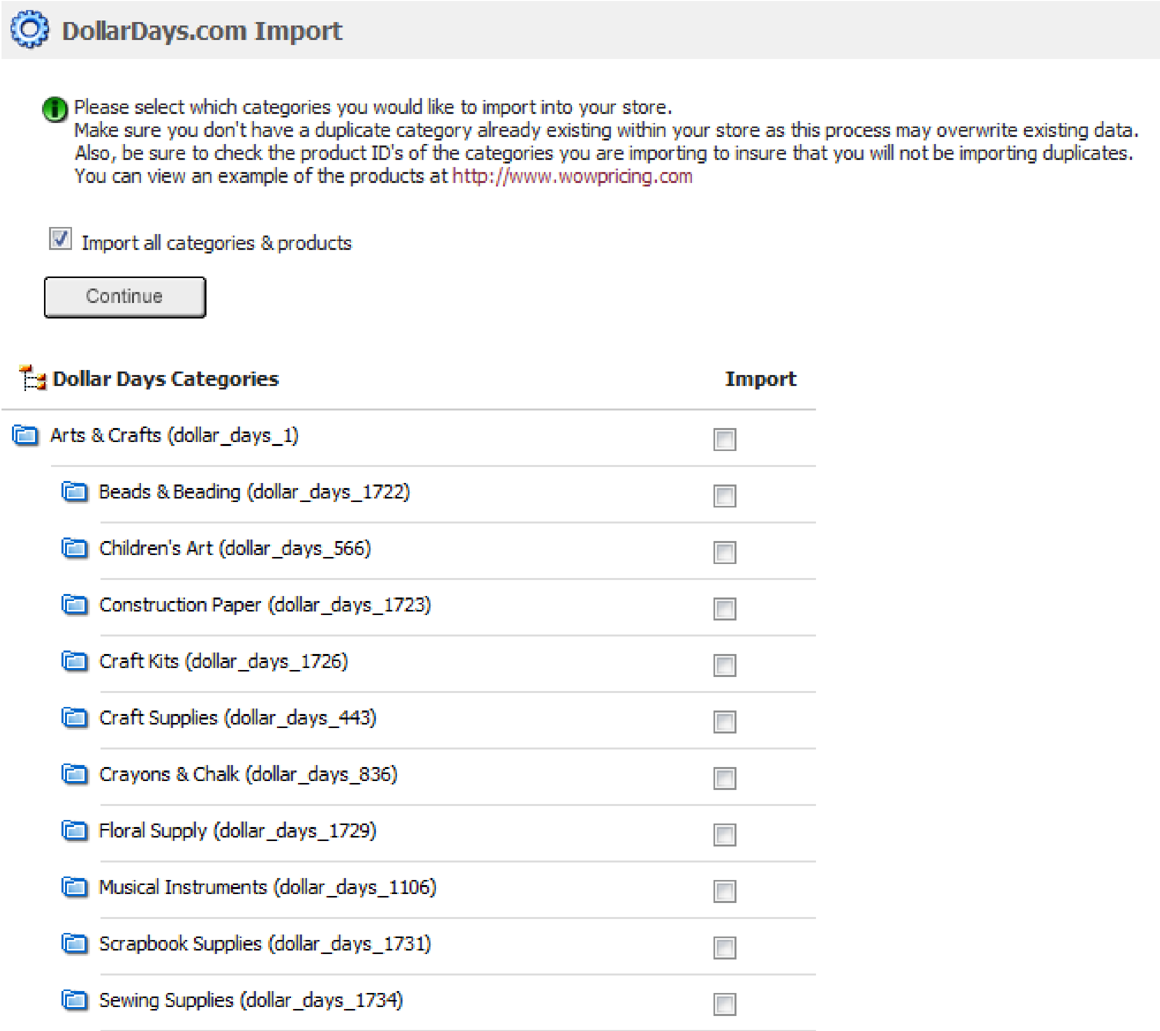
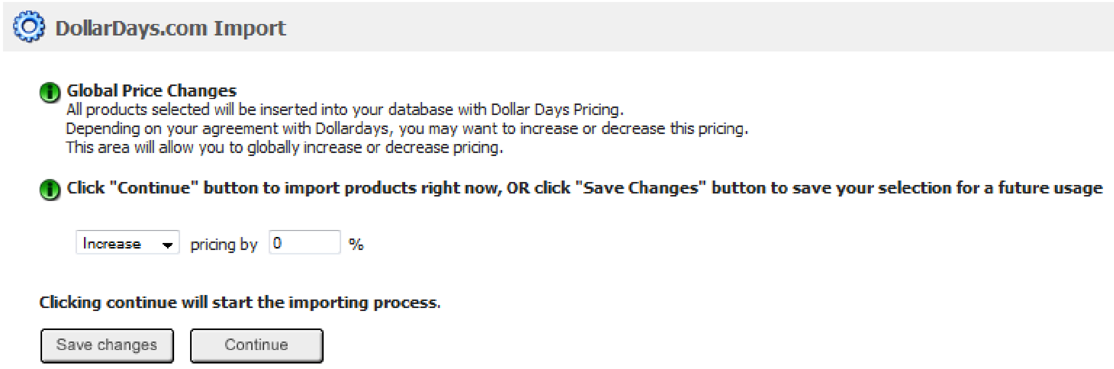


Figure 8-6-3: DollarDays.com Import Settings

5. Select the products and categories you want to import by selecting the respective checkboxes.

Note: You can also import all settings and products by checking **Import all categories and products** checkbox.

6. Indicate the how much you would like to mark-up the item prices. *Note: Dollar Days product prices reflect your cost, therefore you will need to mark-up the prices using the Global Price Changes feature to get a profit on any item you sell.*



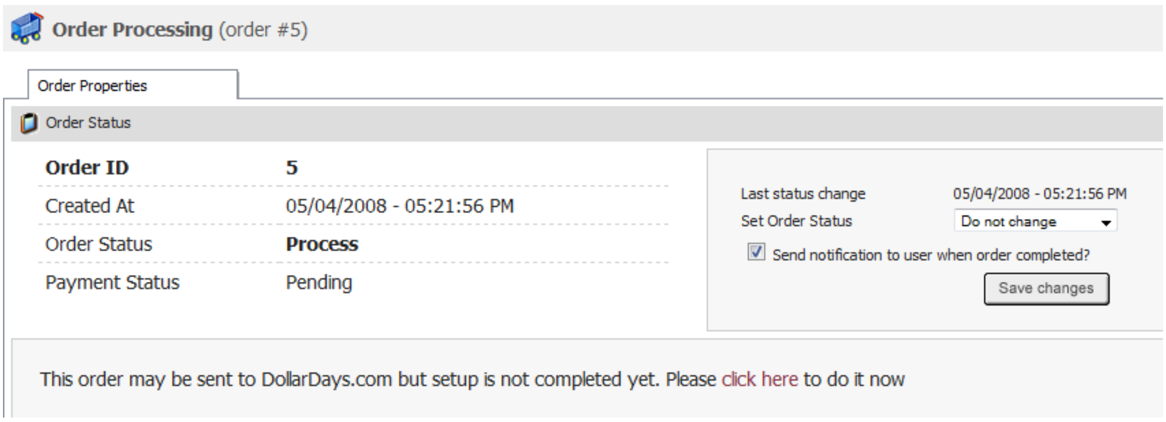
Selecting a duplicate category or product that already exist in your store may overwrite the existing ones. Hence, make sure you don't have a duplicate category and always check the product ID's of the categories you are importing.

6. Click **Continue** button to finish import process.

> **Important:** All Dollar Days items import into Springboard Promocart with the shipping price already set. You will not need to set up any shipping methods for these products.

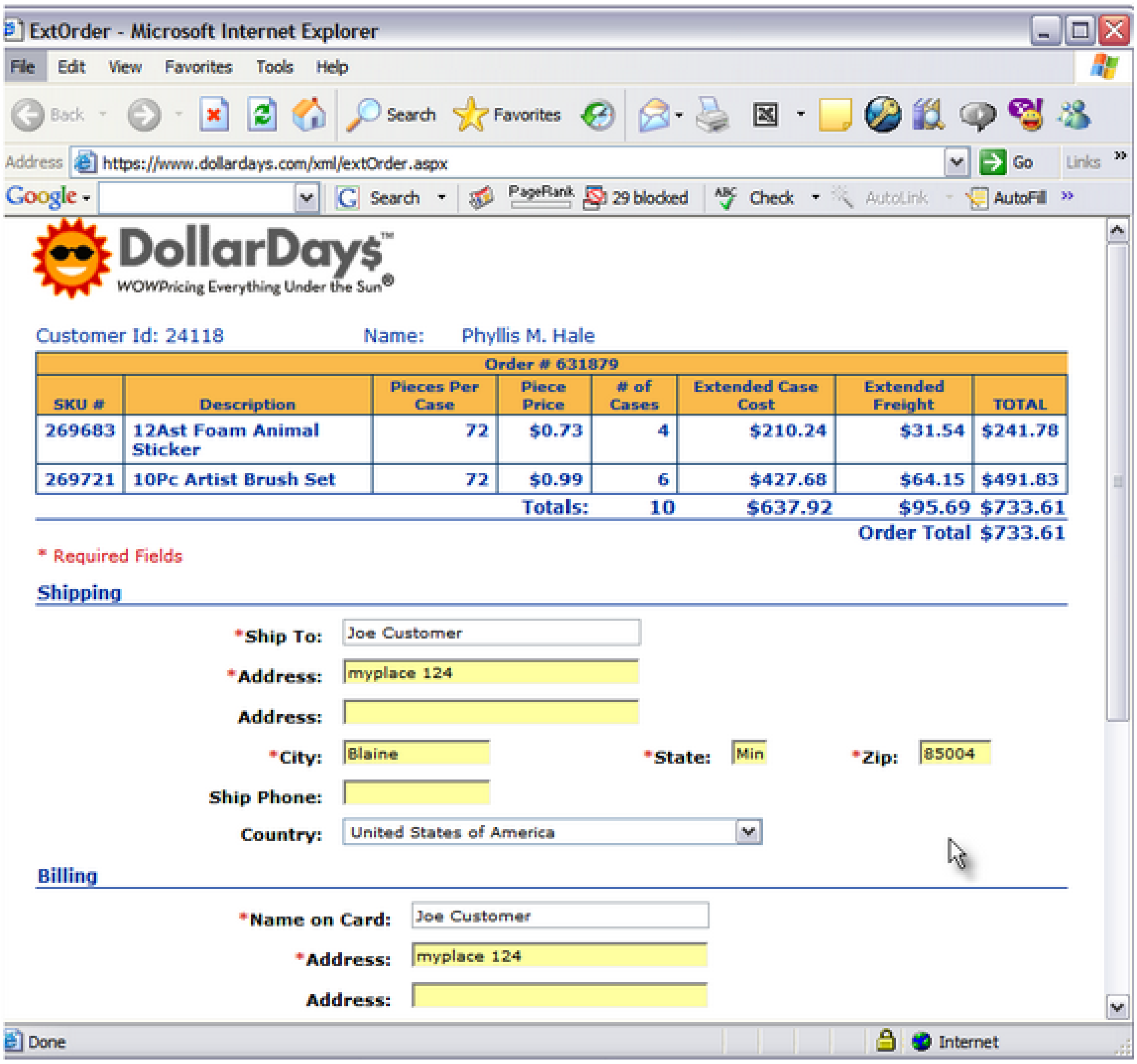
8.4.1 Placing Orders Through Dollar Days

If a customer of yours places an order that includes a Dollar Days item, the cart indicate this on the Order page within the admin area.



1. **Click the Send order to DollarDays.com** link on the order page. A pop-up window will an invoice from Dollar Days and the items purchased by your customer. You will use this area to place an order through Dollar Days on behalf of your customer.

Important: You will need to enter in your Dollar Days account information into the "Setup Dollar Days" area for this feature to work. You can set this up at Marketing >> Plugin's >> Product Import >> Setup Dollar Days.



2. Once the pop-up window appears, simply enter in your payment information (remember, the customer has already paid you for the order) to complete the order.

Dollar Days will ship the item(s) to the customer on your behalf. If the order contains both Dollar Days items and items you sell, you will need to return to the order screen to process your items.

8.5 Google

Google supplies business owners with a variety of tools that can help you gain more exposure, track visitors and sales conversions.

Click on the tabs below for a summary of these tools and how they can better help your business.

Please understand setting up conversion tracking through Analytics and Adwords can be fairly complex will require you to change the code snippets provided. Please be sure you read the documentation provided by Google to fully understand this process.

8.5.1 Google Sitemaps

Google Site Maps allows you to inform search engines about URLs on your websites that are available for crawling. In its simplest form, a Sitemap that uses the Sitemap Protocol is an XML file that lists URLs for a site.

To use **Google Sitemap**, follow the steps below.

1. Open the **Marketing : Google** page.
2. Click on **Google Sitemaps** tab to open **Google Site Map Export** page, as shown in the Figure 8-7-2 below.

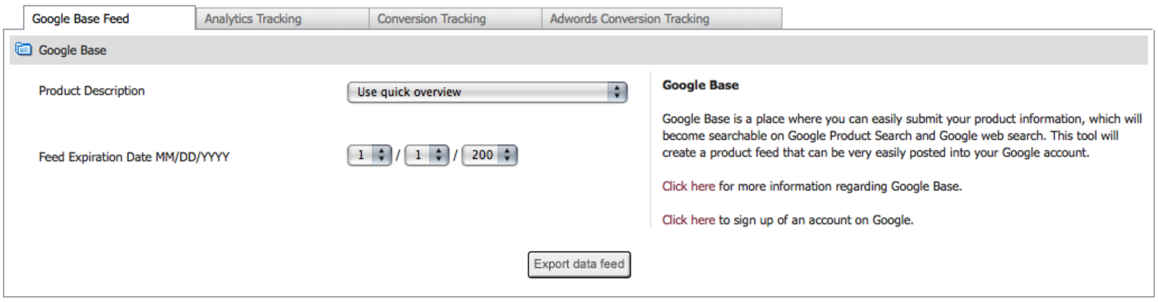


Figure 8-7-2: Google Site Map Export

3. Click **Continue** button to export your sitemap in an XML format to your local computer.

A **File Download Dialog** box will appear, as shown in Figure 8-7-3 below.

4. Click **Save** button to save the file to your local computer.

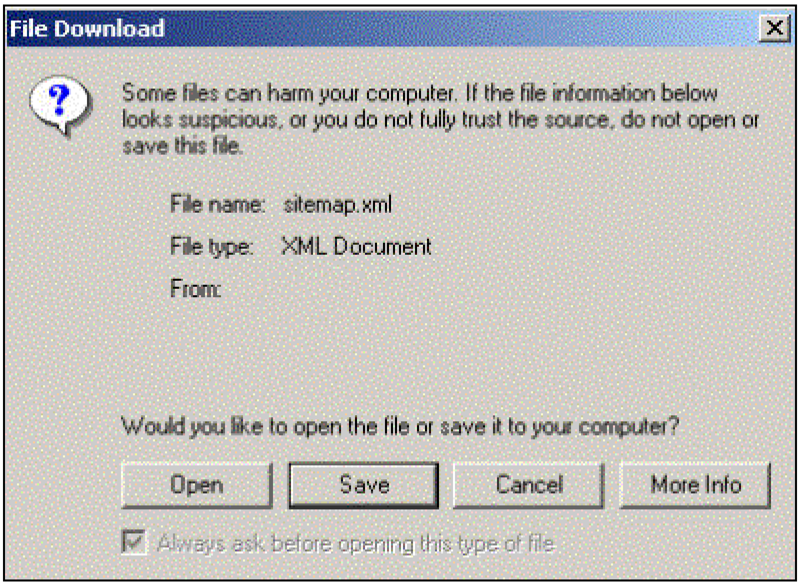
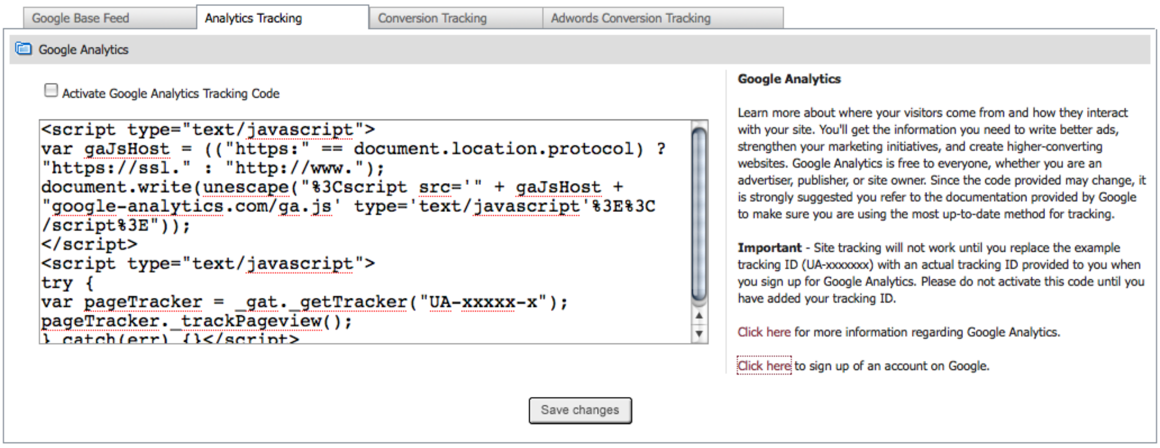


Figure 8-7-3: Data Download

8.5.2 Analytics Tracking

To use **Google Analytics Tracking**, follow the steps below.

1. <u>Open</u> the **Marketing : Google** page.
2. Click on **Google Analytics** tab to open **Google Analytics** page, as shown



Important - Site tracking will not work until you replace the example tracking ID (UA-xxxxxxx) with an actual tracking ID provided to you when you sign up for Google Analytics. Please do not activate this code until you have added your tracking ID.

Learn more about where your visitors come from and how they interact with your site. You'll get the information you need to write better ads, strengthen your marketing initiatives, and create higher-converting websites. Google Analytics is free to everyone, whether you are an advertiser, publisher, or site owner. Since the code provided may change, it is strongly suggested you refer to the documentation provided by Google to make sure you are using the most up-to-date method for tracking.

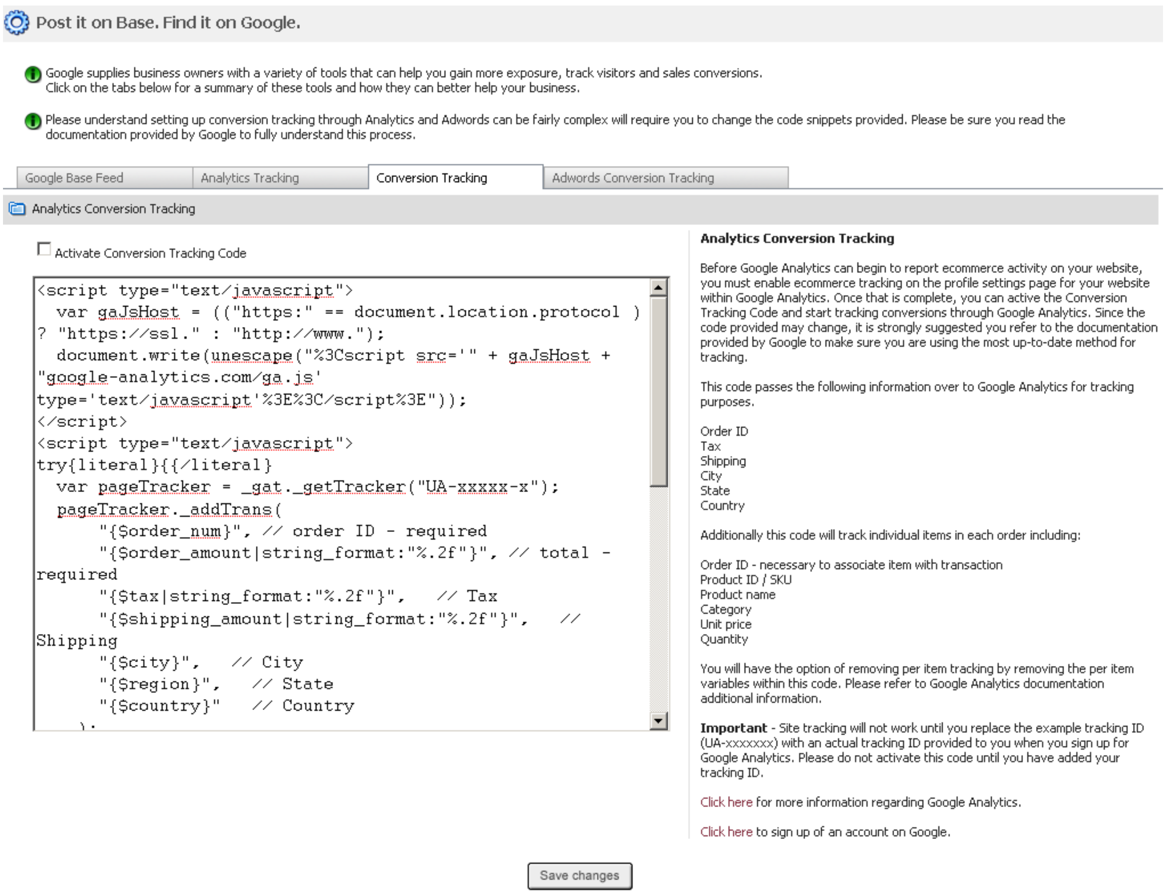
Click here for more information regarding Google Analytics.

Click here to sign up of an account on Google.

8.5.3 Conversion Tracking

To use **Google Analytics Conversion Tracking**, follow the steps below.

1. Open the **Marketing : Google** page.
2. Click on **Conversion Tracking** tab to open **Conversion Tracking** page, as shown below.



Before Google Analytics can begin to report ecommerce activity on your website, you must enable ecommerce tracking on the profile settings page for your website within Google Analytics. Once that is complete, you can active the Conversion Tracking Code and start tracking conversions through Google Analytics. Since the code provided may change, it is strongly suggested you refer to the documentation provided by Google to make sure you are using the most up-to-date method for tracking.

This code passes the following information over to Google Analytics for tracking purposes.

Order ID

Tax

Shipping

City

State

Country

Additionally this code will track individual items in each order including:

Order ID - necessary to associate item with transaction

Product ID / SKU

Product name

Category

Unit price

Quantity

You will have the option of removing per item tracking by removing the per item variables within this code. Please refer to Google Analytics documentation additional information.

Important - Site tracking will not work until you replace the example tracking ID (UA-xxxxxxx) with an actual tracking ID provided to you when you sign up for Google Analytics. Please do not activate this code until you have added your tracking ID.

Click here for more information regarding Google Analytics.

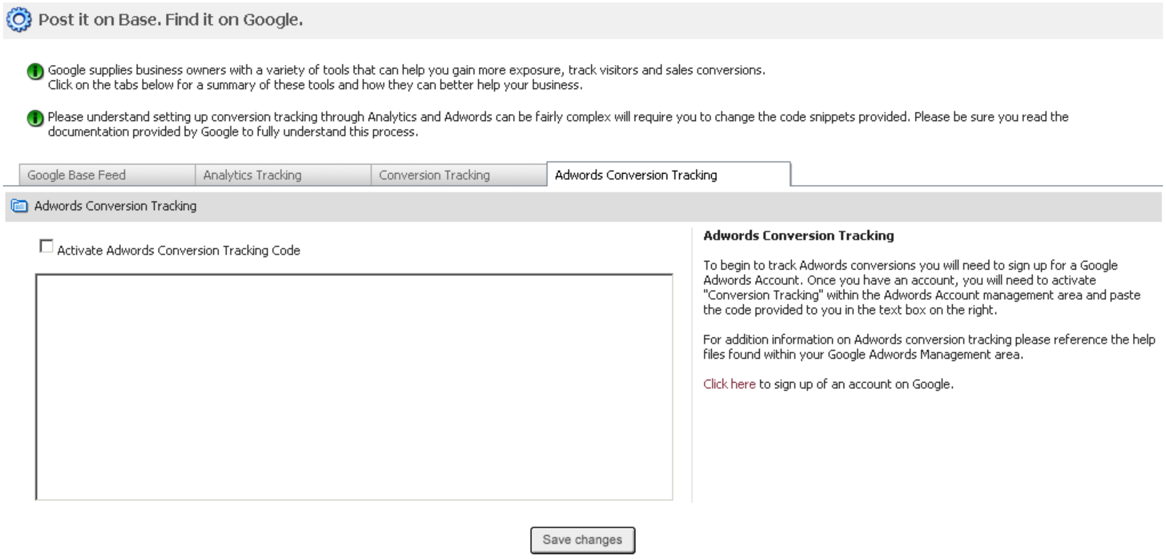
Click here to sign up of an account on Google.

8.5.4 Adwords Conversion Tracking

To use **Google Adwords Conversion Tracking**, follow the steps below.

1. Open the **Marketing : Google** page.
2. Click on **Adwords Conversion Tracking** tab to open **Adwords Conversion Tracking** page, as shown below.

.



To begin to track Adwords conversions you will need to sign up for a Google Adwords Account. Once you have an account, you will need to activate "Conversion Tracking" within the Adwords Account management area and paste the code provided to you in the text box on the right.

For addition information on Adwords conversion tracking please reference the help files found within your Google Adwords Management area

Click here to sign up of an account on Google.

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